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106 | Tools & Techniques for Conducting Online Research $1,595

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505 | Market Segmentation Research $1,595

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506 | Customer Satisfaction and Loyalty Research $1,595

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San Francisco	July 13-14
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508 | Positioning Research $950

Los Angeles	July 20
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601 | Data Analysis for Marketing Research: The Fundamentals $1,595

Chicago	June 5-6
Baltimore	Aug 14-15
San Francisco	Dec 4-5

602 | Tools & Techniques of Data Analysis $2,395

Chicago	Aug 1-4
San Francisco	Sept 18-21
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603 | Practical Multivariate Analysis $2,395

Chicago	Aug 8-11
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604 | Practical Conjoint Analysis & Discrete Choice Modeling $1,595

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in case you missed it...

news and notes on marketing and research

Convenience is a dirty word to these Italian consumers

An April 25, 2006 article in the *Wall Street Journal* told an instructive tale of the difficulties encountered by marketers such as Unilever and Procter & Gamble in selling their time-saving cleaning products to Italian women, many of whom take their chores very seriously.

P&G research showed that Italians devote 21 hours a week to household chores other than cooking - Americans spend just four hours. They wash kitchen and bathroom floors at least four times a week, compared to the U.S. consumer's once-a-week cleansing.

Despite those hours and hours of labor, Italians aren't necessarily a perfect market for convenience products. They want products that are tough cleaners, not timesavers. For example, dishwasher makers targeting the Italian market have had to fight the perception that machines don't get dishes as clean as hand-washing.

When Unilever's Cif brand cleaning spray flopped, company research found that Italian women needed convincing that a spray could be strong enough, especially on kitchen grease. The company spent 18 months reformulating the product, testing its power against grease. It changed the focus of advertising from convenience to cleaning ability. And when it was learned that the women felt they needed different cleaners for different tasks, new varieties were created. Containers were also made 50 percent larger because Italians clean so frequently.

P&G's Swiffer Wet mop bombed as a cleaner but research found that Italian women were using it to polish after mopping, so the firm created a Swiffer with beeswax, which it sells only in Italy. Another variety, the Swiffer duster, is sold in many countries but is especially popular in Italy, selling five million boxes in its first eight months, twice the company's forecasts.

"It was a real shift of mind-set on how to market products like these," said Alessandra Bellini, head of marketing for Unilever's home and personal-care products. "If you present a product as quick and easy, women may feel like a cheat….It took us a while to understand that Italians didn't want that."

"Women in Italy Like to Clean but Shun the Quick and Easy," *Wall Street Journal*, April 25, 2006

I am man, watch me buy

A September 4, 2006 *BusinessWeek* cover story by Nanette Byrnes chronicled the latest efforts of companies to market to men in the post-metrosexual era. Citing a study by Leo Burnett, which claims that metrosexuals and their evil twins the retrosexuals (the beer-swilling, burger-munching louts wearing the backwards ball caps) only account for two in every five men, the article outlined Madison Avenue's current state of thinking on how to sell to the guys in the middle of that spectrum.

Obviously, the product or service dictates the strategy. Through ads that focus on technology, Dyson vacuums have become a hit by appealing to the inner geek in men (40 percent of Dyson's customers are men). Sly humor and a great Web site (www.shaveeverywhere.com) helped make Norelco's Bodygroom electric shaver (for removing hair "below the neck") a hit.

Marketers shouldn't overlook the purchasing power of teenage boys, many of whom have mastered the Web as a product research vehicle and flock to it as an outlet for forming bonds with products they like. Teenage Research Unlimited coined the term maturiteen to describe a group of teens who are more savvy, responsible and pragmatic than previous cohorts, thanks in part to the tendency of their Boomer parents to treat them as equals.

Speaking of Boomers, even that most boring of creatures, the Boomer dad, has a lot to offer marketers. These men are in their peak earning years and are almost as likely to be found shopping for diapers as moms are. Companies such as Patek Philippe and Dyson are aiming their efforts at this group.

The article offered four quick tips for capturing the attention of the male consumer: stop boring him (don't fall back on tired approaches and messages), keep it basic (men don't like products they have to fuss with), get him talking (harness the power of word of mouth), and don't fake it (if you try too hard to be hip you'll be quickly exposed as a fraud and ridiculed for it).

"Secrets of the Male Shopper," *BusinessWeek*, September 4, 2006

They'll take it to go in Birmingham

An analysis of quick-service and sit-down restaurant patronage in the U.S. by New York-based Scarborough Research shows that while the average adult visits a quick-service restaurant such as McDonald's or Subway 5.2 times in a given month, residents of Birmingham, Ala., visit a quick-service restaurant 6.5 times in the average month. Louisville, Ky., (6.4 average visits), Austin, Texas (6.3 average visits), Memphis, Tenn., (6.3 average visits) and Raleigh, N.C., (6.2 average visits) round out the top five local markets for frequent fast-food restaurant patronage.

In the sit-down restaurant category, which includes establishments such as Applebees, T.G.I. Friday's and Boston Market, the average adult visits one of these restaurants 3.4 times a month. Orlando, Fla. is the top local market for the frequent sit-down restaurant patronage. Consumers here visit a sit-down restaurant 4.5 times monthly. Cincinnati (4.2 average visits), Fort Myers, Fla. (4.2 average visits), Tampa, Fla. (4.1 average visits) and Atlanta (4.1 average visits) complete the top five local markets for frequent sit-down restaurant patronage.

DIY market headed for slow-down

Following a five-year boom, home-channel do-it-yourself (DIY) sales will slump over the next five years, predicts a report by Chicago research firm Mintel. While housing sales and in-store how-to programs significantly boosted DIY sales over the last five years, this $460 billion industry is preparing to overcome the challenges of a cooling market.

Lowe's and Home Depot have both increased mailings of their retail credit card offerings by almost 150 percent in an effort to bolster business, according to Mintel Comperemedia, which analyzes direct mail and print media. According to Mintel's research, 90 percent of consumers purchase home improvement products at home centers, but few shop at just one type of store. Retailers have placed their hope in three emerging DIY markets: women, Hispanics and Baby Boomers. "We saw retailers make many outreach efforts last year," says Justin De Santis, analyst with Mintel. "For example, suppliers introduced new lines of traditionally male-oriented products such as hand tools with ergonomic features, design and packaging that specifically targeted the female DIYer. There is a major opportunity to provide more targeted products for this group."

To appeal to women who are increasingly taking home improvement into their own hands, major retailers such as Lowe's and Home Depot are offering educational workshops, adapting product lines and making store layouts more female-friendly. Mintel research reports that close to 60 percent of women surveyed had undertaken a DIY project in the last year.

Do-it-yourself needs are also expected to grow in the Hispanic market over the next five years. Retailers are expanding Hispanic and Spanish-speaking staff while continuing to introduce bilingual signage and packaging. The projected number of Hispanic homebuyers will also drive sales opportunities.

DIY retailers are also focusing their product and service offerings on Baby Boomers, who are predicted to buy everything from high-end furniture to small barbecues at DIY stores. Home Depot's acquisition of online company Home Decorators Collection sets the stage for more expansion opportunities that can attract this key group. Boomers growing into the 50-65 age bracket will cause that segment to be the fastest-growing age group in the U.S. until 2010, and Mintel predicts that installation services sales and one-stop shopping will increase as this market seeks more "do it for me" purchases.

"Companies will need to continue providing more programs and services to attract these emerging groups," says De Santis. "They will also need to consider creating more initiatives that differentiate them more solidly from each other. Gaining loyal customers will be important as the DIY competition continues to heat up." For more information visit www.mintel.com.

High gas prices mean less dining out, fewer shopping trips

The June edition of BIGresearch's Consumer Intentions and Actions Survey found that consumers are making difficult choices to offset the rising cost of driving. When asked if fluctuating gas prices have impacted their spending, 75.3 percent of nearly 7,500 respondents agreed. While that may come as no surprise, the survey results raise a major red flag for business and retail. "It's not just people making less than $50,000 per year who are rethinking their household spending," says Joe Pilotta, vice president of research for BIGresearch, Columbus, Ohio. "People making over $50,000 per year are also feeling the pinch of gasoline price hikes and are cutting back in many of the same ways."

So where are they cutting back? The top three areas listed for both income groups included driving, dining out and vacation/travel. Both groups also indicated that inflated gas prices have caused them to spend less on clothing and groceries as well as delay major purchases such as a car, electronics or furniture. "With the continued impact of higher gas prices, shopping has become increasingly difficult," says Pilotta. "With gas costing some drivers in excess of $40-$50 per week, consumers have to think more realistically about adding the cost of driving to their household budget than in the past - and coming up with ways to help offset the

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names of note

Yahoo has named **Peter Daboll** chief of insights and global market research.

Wendy's has created an innovations and strategy group that will oversee research and development, insights and other functions. The new group will report to Executive Vice President/Chief Marketing Officer **Ian Rowden**. Rowden has named three Wendy's executives to the group. Senior Vice President **Mike Watson** is overseeing operations innovation for Wendy's 10,000 restaurants. Senior Vice President **Lori Estrada**, who oversees new products and packaging, will helm research and development. **Casey Minton**, a vice president, is leading strategic insights and innovation, focusing on consumer research and developing new revenue streams.

Bell, Falla and Associates LLC, a Norwalk, Conn., marketing research firm, has named **Karen LeSieur** executive vice president and **Adrienne Vitti** project manager.

WestGroup Research of Phoenix has hired **Connie Fields** as focus facilities manager and **Melissa Skogan** as a support analyst.

Richard Goosey, senior vice president, marketing science and methodology at *Harris Interactive*, Rochester, N.Y., has been given a Fellowship Award by the U.K.'s Market Research Society (MRS). The honor is awarded to a full member deemed to have made a significant contribution to market research and/or the MRS for at least 10 years. Separately, **Aled Morris**, U.K. managing director at Harris Interactive, has resigned and joined a personnel/recruitment firm as a principal partner.

M/A/R/C Research, Irving, Texas, has named Paul Kirch director of client development for Online Survey Solution, an operating unit of M/A/R/C Research.

Loganville, Ga., research firm *MRT Services Inc*. has named **Cynthia Thompson** operations manager.

Nicholas Market Research Associates International, New York, has tapped **Laurie Rosner** to establish a new division, Nicholas Healthcare. The firm has also added **Theodora Stites** as an account executive and moderator.

Research Now has named **Charles Pearson** senior vice president, business development. He has relocated from San Francisco to the company's London head office.

London-based *TNS* has named **Gaurav Bhalla** global innovation director, based in Washington, D.C. In addition, **David Moxley** has been chosen to head up a new customer insight consulting team. He is based in Toronto.

Canada-based research firm *Vision Critical* has promoted **Kris Hartvigsen** to vice president of business development.

Washington, D. C.-based research firm *Zogby International* announced a number of new hires and promotions. Hires: **Christopher Koehnke**, office manager, Washington D.C.; **Shane Nelson**, international division executive; **Fritz Wenzel**, director of communications; **Ashraf Faramawi**, international project manager; **Jonathan Zogby**, director of domestic business development; **Phillip Vanno**, assistant editor; **Mark Warner**, editor/writer; **Kimberly Wyborski,** human resource coordinator; **Paul Zogby**, systems assistant. Promotions: **Leann Atkinson** to project manager and **Christian Peck** to client strategy manager.

Montreal-based research software firm *Voxco* has named **Gilles Bernasconi** managing director of Voxco France. Also at Voxco France, **Nicolas Roullier** has been named sales manager and **Murielle Majesté** has been named technical support specialist.

Farmington Hills, Mich., research firm *MORPACE International Inc.* has named **Jeffrey Kaufman** research director. He is based in the company's office in Irvine, Calif.

Information firm *VNU* Group B.V. has named **R. Ford Dallmeyer** senior vice president and general counsel of its VNU Marketing Information group and ACNielsen. In addition, the firm named **Michael Marchesano** to the new position of executive vice president and chief transformation officer, responsible for leading the company's Project Forward business transformation program.

In conjunction with opening a new office in Tokyo, *Lightspeed Research,* Basking Ridge, N.J., has named **Chris Duston** vice president of business development in Japan.

Synovate has named **Craig Harvey** director, media research - Asia Pacific. **Stephen von Bevern** has been named vice president of online data collection. **Jo-Ann Osipow** has been named senior vice president of tracking and communication solutions for the Americas. **Robert Skolnick** has been appointed CEO for Synovate in North America.

Doron Wesly has joined *Millward Brown USA* as vice president, media practice and is based in the New York City office. **Jorge Alagón**, Millward Brown Mexico, has been

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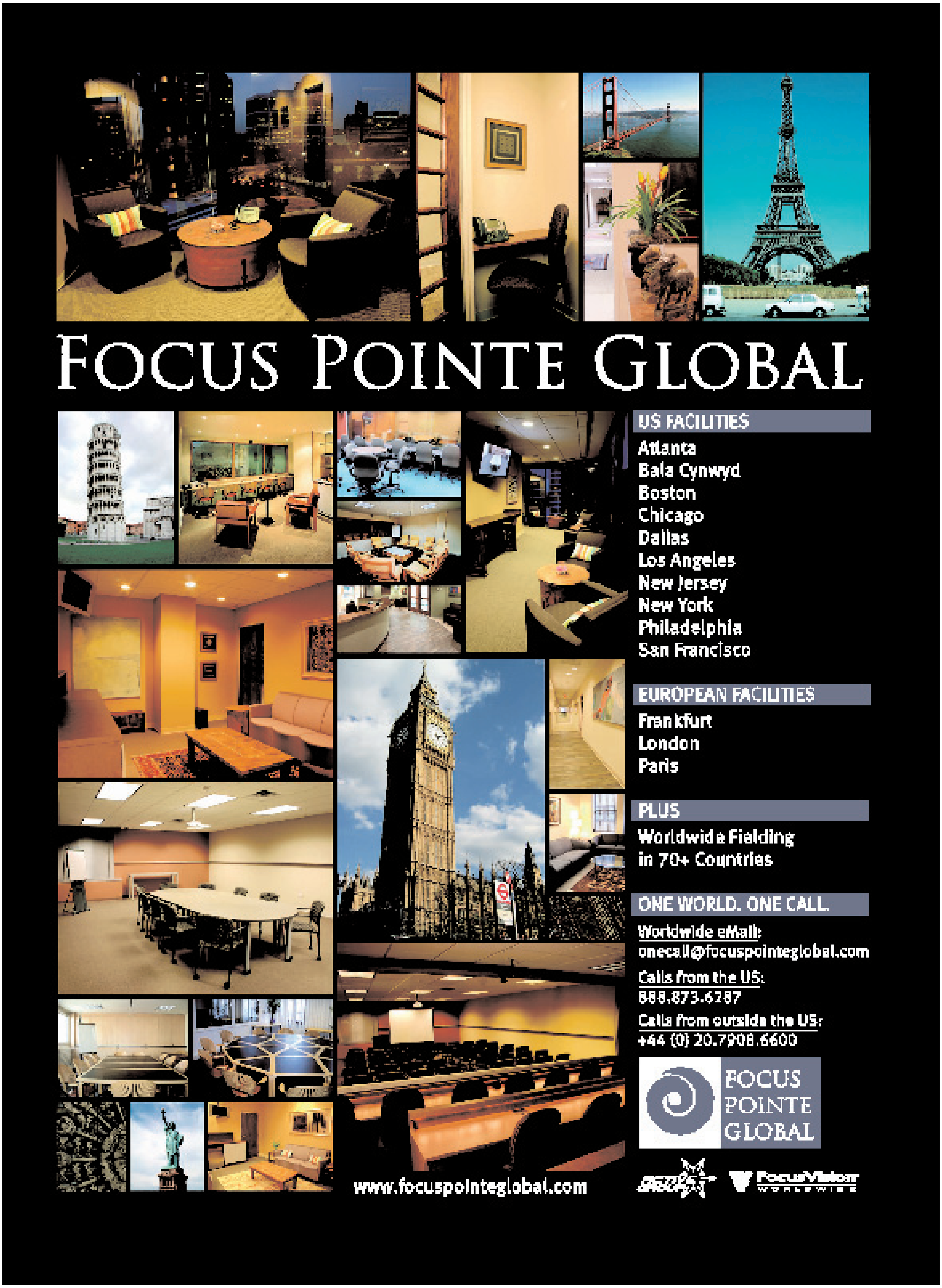
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product and service update

New TiVo division will track DVR users' ad viewership

Alviso, Calif.-based TiVo Inc. has created TiVo Audience Research and Measurement, a division of the company which will offer data and analysis on DVR viewing of advertising content. The Commercial Viewership Reports will provide an understanding of the types of advertisements that are most successful with consumers in TiVo households. Advertisers will know the viewership and effectiveness of their advertisements by network, genre, day-part, time slot, day of week and commercial pod position.

TiVo's research will include assessment and analysis of the impact of fast-forwarding, rewinding, replaying, pausing and other behaviors. The reports are based on anonymous, aggregate data collected from all of TiVo's subscribers across the country, in near real-time, through random analysis of 20,000 of TiVo subscribers per given day. The service delivers data on commercials in any day-part, showing specific viewing patterns and pinpointing specific incidents where viewers showed interaction. The data can be customized at the buyer's request.

TiVo is working with Nissan, as well as OMD NEXT, a consortium of 14 of Omnicom Media Group's clients who have dedicated resources this year to test and learn about the relative impact that new and emerging media platforms are having on traditional media/advertising models, and the relative brand value that each medium brings to the overall media mix. NEXT clients include Bank of America, GE, Visa, Discovery Channel, McDonalds and Anheuser-Busch, among others. For more information visit www.tivo.com.

Online panel surveys disabled consumers and their families

Bainbridge, Ga., disability services firm Butler New Media has launched two new online panels for people with disabilities, their family members and other stakeholders. With the name Ability, the panels allow respondents to participate in mystery shopping, market research and other specialized studies. The two panels that people can join are the mystery shopping/evaluation panel and the market research panel. Participants in the mystery shopping panel will have the opportunity to participate in: mystery shopping, product and service evaluations and usability testing. The market research panel is used for surveys, opinion polls, focus groups and other specialized research. For more information visit www.abilitypanel.com.

Service mines consumer comments on blogs, chat rooms

San Francisco research firm MarketTools has debuted Insight Networks, which allows users to capture the universe of voices from a variety of online resources and existing electronic content, interact with social networks and online communities, and synthesize that feedback. By tapping into consumers' own means of communication, such as blogs, chat rooms, message boards, video and online groups, the product enables companies to listen in to and join the conversations to stay abreast of fast-changing issues, trends and opinions. For more information visit www.markettools.com.

Research Now adds country-specific panels; auto-ownership screener

London-based Research Now has added a number of research-only panels to its European portfolio. The countries include: Portugal (www.opinioesdevalor.com), Greece (www.polytimesgnomes.gr), the Netherlands (www. waardevollemening.nl), Sweden (www. dinasikt.se), Norway (www.verdi-

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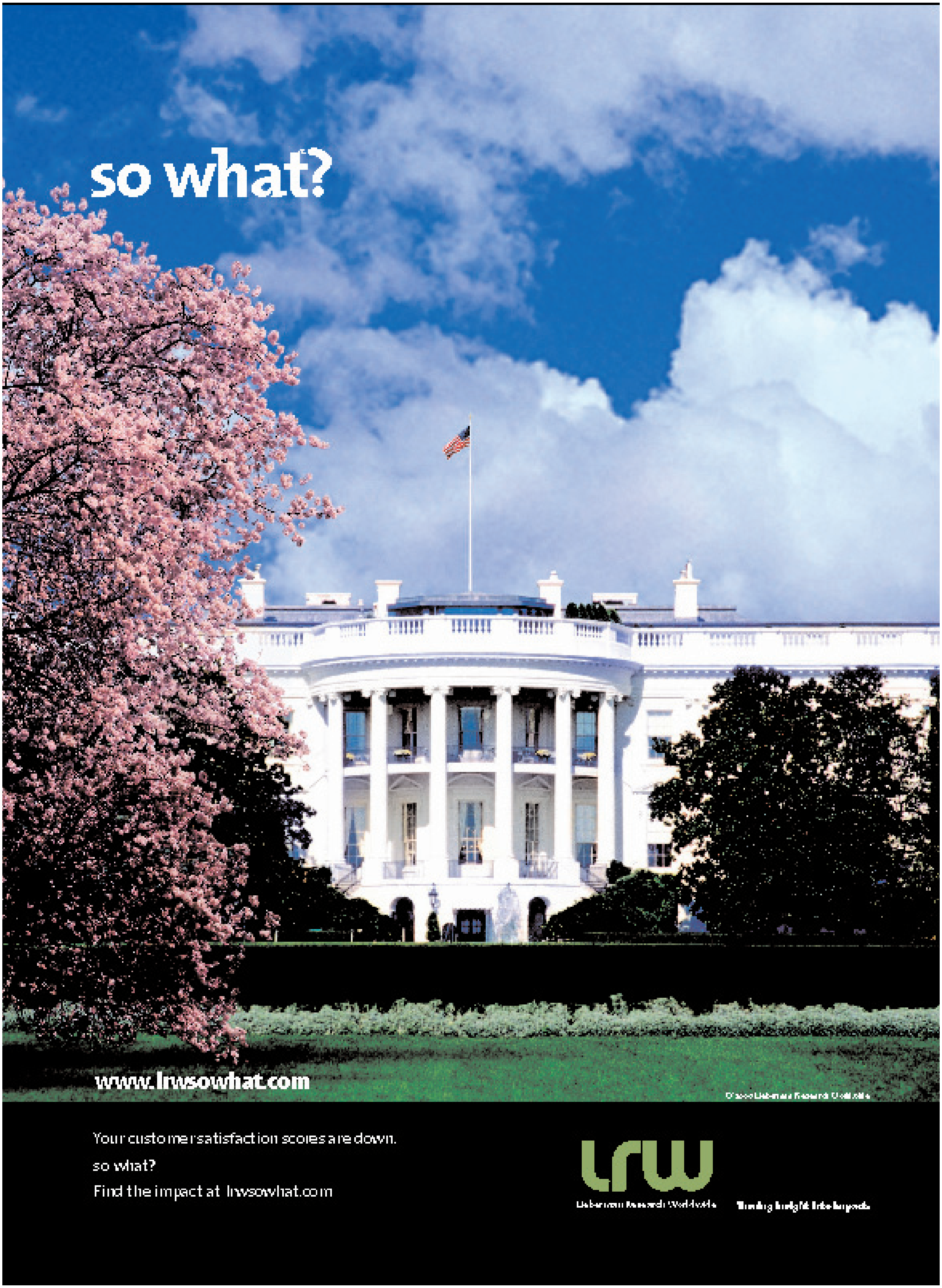
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research industry news

News notes

The research industry remains healthy, with longer-term compound annual growth rates of 4-6 percent, according to **ESOMAR's** newly released 2005 Global Market Research Report. The report also highlights the success of newer methodologies such as online, which now represents 20 percent of market research expenditure worldwide. The report reveals that the industry now represents estimated global revenues of $23,290 million with a 7 percent growth rate compared to 2004 (real growth rate adjusted for inflation is 4.3 percent). Asia-Pacific and the new EU member states showed a 7.4 percent real growth rate.

The 15 mature EU markets remain buoyant too, with a 5.4 percent growth rate, one point above the global average. With an estimated revenue of $10,437 million, Europe continues to generate the most market research revenue (45 percent of the total), followed by North America ($8,295 million; 36 percent of total market research revenue).

Europe - along with the Middle East and Africa - is the only area to have experienced a strong real growth in 2005 compared to 2004.

The fastest-growing markets include Latvia (34 percent growth), China (25 percent), Thailand (23 percent), Bulgaria (22 percent) and Malaysia (20 percent). The results also show that amongst the largest markets, France grew the fastest at 3.2 percent followed by Germany (2.8 percent), the U.S. (2.1 percent) and Japan (2 percent). The U.K. remains stable with 0.7 percent growth.

The 2005 Report also demonstrates that online research is now playing a key role in market research around the world, representing 20 percent of expenditure on data collection methods. This figure nearly has nearly doubled from 2004 to 2005 (11 percent in 2004).

At the same time face-to-face interviews have dramatically decreased, now representing 21 percent of data collection compared to 31 percent in 2004. Telephone interviews are currently the most popular data collection method, representing 22 percent (relatively stable compared to 2004 with a two-point decrease). The quantitative/qualitative ratio remains constant with 2004 with roughly a 80/20 split.

Research firm **Synovate** launched an initiative to promote growth and better align the company with the needs of clients. Called "From Now to Wow," the program will apply across all business units, support services and

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Calendar of Events October-December

The Council of American Survey Research Organizations will hold its annual members-only conference on October 18-20 at the Ritz-Carlton, Marina del Rey, Calif. For more information visit www.casro.org.

Mature Marketing and Research will hold a conference, titled Beyond the Boomers: The Transition Years, at the Chicago Hilton on October 20. *Quirk's* subscribers can receive a discounted registration fee. For more information contact Les Harris at mmrharris@aol.com.

The Society of Insurance Research will hold its annual conference/workshops and exhibit fair on October 22-25 at the Francis Marion Hotel, Charleston, S.C. For more information visit www.sirnet.org.

IIR will hold its annual market research event on October 22-26 at the Century Plaza Hotel in Los Angeles. *Quirk's* subscribers can receive 15 percent off the standard price by using registration priority code XM1828QUIRKS. For more information visit www.themarketresearchevent.com.

ESOMAR will hold its annual Latin American conference on October 25-27 in Rio de Janeiro. For more information visit www.esomar.org.

ESOMAR will hold a conference on researching the leisure industry on November 5-7 at the Radisson SAS Hotel Rome. For more information visit www.esomar.org.

IIR will hold its future trends conference on November 6-8 at the Ritz-Carlton, South Beach, Miami. For more information visit www.iirusa.com/futuretrends.

ESOMAR will hold a conference on researching responsible business practices on November 7-8 at the Radisson SAS Hotel Rome. For more information visit www.esomar.org.

ESOMAR will hold a conference on public sector research on November 8-9 at the Radisson SAS Hotel Rome. For more information visit www.esomar.org.

The Marketing Research Association will hold its annual fall education conference on November 8-10 at the Sheraton Wild Horse Pass Hotel, Scottsdale, Ariz. For more information visit www.mra-net.org.

IIR will hold its European market research event on November 13-16 at the Riverbank Park Plaza Hotel in London. For more information visit www.iirusa.com.

ESOMAR will hold a conference on panel research on November 27-29 at the Hotel Arts Barcelona, Barcelona, Spain. For more information visit www.esomar.org.

ESOMAR will hold a conference on researching the telecommunications industry on November 29-December 1 at the Hotel Arts Barcelona, Barcelona, Spain. For more information visit www.esomar.org.

By Holly M. O'Neill

Projectives set the stage for fresher consumer insights

As marketers, we are well aware of the power of perception. But, as market researchers, how do we tap into these perceptions? How do we accurately assess them so that we can leverage future management decisions? One way to uncover consumer perceptions - the real emotions that shape brand relationships and drive purchase behavior - is the use of projective techniques in focus groups.

Our left-brains control logic, analysis, science, mathematics and language. Our right-brains control intuition, creativity, imagination, art and music. Dialogue is left-brained and therefore controlled by logic, while perceptions are governed by our right-brains. Therefore, to tap perceptions of importance to marketers, we must use right-brained techniques like projectives.

Skilled moderators are adept at interpreting consumer behavior, understanding group dynamics, leading active discussions and using projective techniques. In a group that relies solely on structured dialogue, respondents can become too analytical or they may be unable to articulate their deep-seated opinions and feelings. One very effective method of helping respondents verbalize their subconscious is projective exercises.

Projective exercises can elicit in-depth feedback, well above and beyond rational, top-of-mind answers. These techniques reveal respondent attitudes and better engage their thinking and concentration. Involving respondents in such projective exercises will bring forth issues and opinions that they may not otherwise be able to express or be aware of. Projectives allow market researchers to effectively garner input from all the senses, thus painting rich consumer profiles.

Virtually all focus groups can benefit from at least one projective exercise. Depending upon research objectives, many focus groups can successfully employ more. Projectives can be designed as individual, group or team exercises.

Editor's note: Holly M. O'Neill is president of Talking Business, a Newport Beach, Calif., marketing consulting firm. She can be reached at 949-721-4160 or at holly@talkingbusiness.net.

Projective techniques must be relevant to the research topic and objectives, as well as the respondent base. Since exercises most often need to be issue-centric, some degree of customization is usually necessary.

A seasoned focus group moderator has dozens of projective techniques in her toolkit. Here are three of my favorites:

• *Picture this, picture that*

"Picture this picture that" is valuable for revealing imagery and emotional associations. This technique involves pre-selecting about 50 different images that represent a wide range of possible emotions. Moderators should choose rich graphics and avoid including any that are directly related to the category (e.g., don't include engagement ring advertisements if researching


so what?
www.lrwsowhat.com
You want to clone your best customer
so what?
Find the impact at lrwsowhat.com
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online dating). Respondents are asked to select a picture that best says how they feel when buying Brand X, how they feel when using Brand Y, etc.

Pictures become metaphors respondents can use to describe their perceptions. These picture metaphors allow them to think more broadly, frame their ideas and overcome their reticence.

• *Sort me up*

"Sort me up" is especially useful in consumer packaged good research to better understand product segmentation and the purchase decision hierarchy. This exercise involves respondents being presented with a representative sample of products from within the study category and asked to work together as a team to sort the products into groups that make sense to them. Respondents are encouraged to create as many product groups as they see fit and asked to give each group a name that describes why those items have been placed together.

The visual stimulation, combined with the physical activity of moving products, generates more thorough thinking. Additionally, the active discussion among respondents provides key insights into the segmentation process, thus increasing understanding of what consumers consider while reviewing products in a specific category.

• *Once upon a story*

"Once upon a story" is especially valuable for gathering and understanding attitudes and imagery cues. The moderator describes a setting or situation and then asks respondents to tell a story related to the scenario. For example, if a research goal is to better understand the perceived image of a specific brand, the moderator could present the following: "Let's pretend you're in the supermarket. The woman next to you has Brand X in her cart. Tell me about that woman. What else does she have in her cart? How is she dressed? Where does she live? What does her house look like - inside and outside? What kind of car does she drive?"

The process of creating a story around a brand, in this example revealing perceived personality cues, encourages respondents to think about the brand in a different way, thus expressing images and biases which their left-brains may be unaware of.

Deeper understanding

If you would like to garner fresher insights and increased learning from your next focus group project, add projective exercises to your discussion guide. You'll be sure to achieve a deeper understanding about your target. While it is more work to prepare and analyze the results, the richness of emotions, perceptions, imagery and biases uncovered are definitely worth the extra effort. | Q

By Dave Leonard and Michael Lieberman

Using key driver analysis to guide employee satisfaction research

Multi-unit retailers and restaurants spend a lot of money and effort trying to understand and manage the thousands of employees in many different locations. Results are typically evaluated on a company level as part of an annual business review. However, this is not the whole picture. Basically, when you are looking at the company, all units are assumed to be "average." This misses significant inter-unit variation and the opportunity to improve performance or correct problems at a specific location.

A basic problem is that we can always "know more than we can prove." Managers of large, multi-unit companies "know" the following:

- management teams at different locations aren't equally effective;
- unit management impacts employee performance;
- employee performance impacts sales and customer satisfaction; and
- management performance impacts employee turnover and morale.

But how do you "prove" it? More importantly, how do you identify the specific areas that each unit management needs to improve? And most important, what do they need to do differently that will improve employee performance and guest results?

The cost of turnover

Most managers know that employee turnover is expensive, but a large majority were unable to quantify the cost of turnover when asked in a recent poll. The cost of hiring and training a new employee can vary greatly - from only a few thousand dollars for hourly employees to between $75,000 and $100,000 for top executives. Costs that are more difficult to estimate include customer service disruption, emotional costs, loss of morale, burnout/absenteeism among remaining employees, loss of experience, continuity and "corporate memory."

Another truth is that unit managers in multi-unit companies hold most of the keys to keeping the right talent.

Case study

The following case study demonstrates methodologies to measure employee attitudes and how to gauge key factors to keep employees happy and productive. We explore a framework within which employee satisfaction can be measured and then describe a concrete methodology to apply these findings to the workplace.

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By using Palm Pilots to implement a unit-level employee survey, we were able to complete three surveys for the cost of one written/paper-based survey. This provided the client company with a snapshot of results more frequently and allowed the individual locations to measure their progress three or four times a year.

Identify the issues

Our client company, Company A, has more than 100 locations structured in

regions and employs several thousand people. In our survey, more than 40 questions were initially asked covering training, management, personal development, the company and customers.

The test objectives were to identify the issues that were most important for employee retention and lower turnover. We sought to demonstrate that significant employee differences can be measured between individual units, and to develop action reports for region/unit managers that highlight differences between units.

Key driver analysis measures the strength of descriptive attributes or performance ratings in relation to a strategic characteristic. What is driving your brand in its market segment? What would make its market share rise? What makes your employees happy at work? Why?

In regression analysis the strategic characteristic is called the dependent variable. What we are looking for is significance. If an attribute is positively significant, this indicates that it has a positive relationship with the dependent variable. If the attribute is high, the dependent variable is high. If the attribute is low, the dependent variable is low. If an attribute is negatively significant, the opposite is true. High attribute, low dependent variable.

In researching employee satisfaction, the dependent variable should not be defined only as the goal of the employer (that is, employee retention, employee satisfaction, etc.). It should also include an evaluation of the impact on customer satisfaction. We are looking for the "why." Why are employees going to remain with the company? Why are they satisfied with their jobs? What aspects of their employment drive their satisfaction? How does their performance impact guest visits and sales?

The survey was constructed as a series of statements within six different categories. Employees were asked to use a 1-7 scale to rate whether a particular aspect of the unit was important or whether they agreed or disagreed with statements about their place of employment or the company in general.

Table 1: Attributes That Drive Employee Intent to Stay

Category	Relative Importance
The company	25%
Management	23%
Teamwork	21%
Personal development	13%
Training	13%
Customers	5%

Results

Table 1 shows the relative area or category importance contributing to employee intent to stay. These normalized relative importances (adding to 100 percent) give an indication of the importance of the overall areas of employee concerns.

After running regressions of the individual questions on the employee survey, the results indicated that there were eight attributes that positively drive intent to stay. Five were negatively significant.

Figure 1 shows the specific eight key question drivers for employee retention. The beta scores are to be interpreted relative to each other. For example, if "It is fun to come to work" has a beta of .26, and "I receive regular feedback about my performance" has a beta of .12, we can say that fun at work is roughly twice as important as regular feedback.

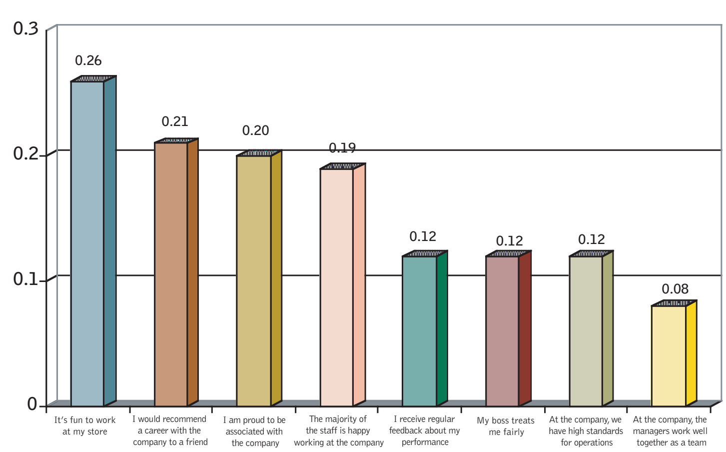
There were also five questions that were negatively related to intent to stay. In order to interpret negative drivers, it is useful to insert a "not" within the attribute. In Figure 2 we have inserted this for further illumination.

Based on the findings shown in Figure 2, we were able to advise our client on immediate actions to improve employee perceptions and performance. The company needs to reinvest in management communication, employee health plans and training.

The power of regression analysis is that it can be run by filtered groups to more fully analyze intent-to-stay priorities. For example, length of employment affects intent-to-stay priorities. Employees with more than two years of experience put more emphasis on: "manager teamwork," "receive regular feedback," "boss treats fairly," "products well received," and "seek to increase sales." Employees with less than two years of experience are more concerned with: "staff is happy," "company pride," "high standards at the company," "receive enough training," and "regional management cares."

The various staff positions have differing priorities linked to employee retention. (It is often important to filter the regression by key groups in order to produce more precise, actionable results.) For example, point-of-sale employees (cashiers, salespeople, etc.) focused more on

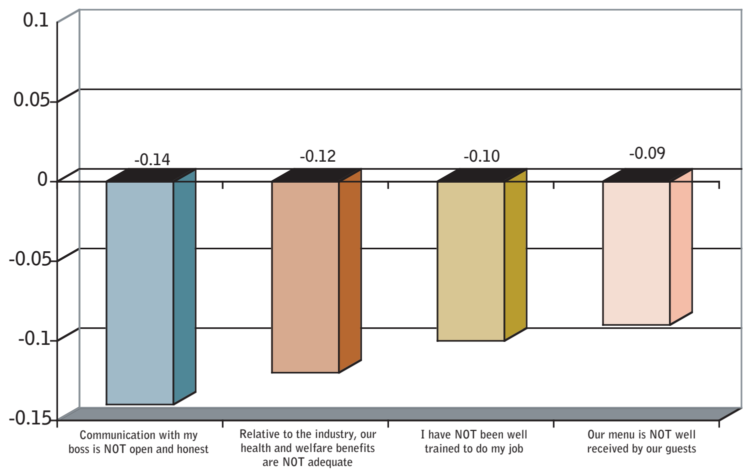
Figure 1: "Intent to stay" drivers



Bob will try anything to get
to know his customers.

VISIONCRITICAL

Figure 2: "Intent to stay" drivers



understanding the retail process (e.g., understand computer systems, promotion and being well trained), whereas backroom employees wanted a supervisor who cares and to be able to sell products that are well-received. Both of these were highly correlated with intent to stay.

Beyond the statistical "proof" developed in our initial testing and development of the employee survey, we also tracked unit sales, guest satisfaction and employee retention over 12 months. Management teams that were able to drive their employee ratings consistently higher:

- outperformed the company results on customer satisfaction;
- outperformed the company on sales results; and
- improved their employee retention and beat the company results.

Vital challenge

Measuring and improving employee retention is an increasingly vital challenge, essential to the smooth function of multi-location operations that involve far-flung management and staff personnel. Combining the reduced technology costs of Palm Pilots with the power of regression analyses identified what was important to improving performance and provided a measurable basis for each unit to target the specific areas that needed to improve.

Not all management teams are equally good at communication, training, etc. The employee survey system that was developed let them "know" their real effectiveness on the important issues impacting their employees' performance – and what to do about them to help improve the customer experience. | Q

By Philip Derham

Increase response rates by increasing relevance

The value of results from self-completion surveys depend in part on the proportion of the sample that responded, as larger samples generally provide more statistically reliable data. Hence, market researchers properly seek to maximize response rates. But findings from some recent surveys suggest respondent relevance to the survey questions is more important than getting a larger response from the sample. This article details findings from five recent Australian financial industry surveys which, when seen as a whole, suggest respondent relevance may be more important than the overall response rates.

If these findings are replicated in other self-completion surveys in other sectors, researchers can:

- improve their contact approaches to increase the overall response rates, by increasing response rates within specific segments, and
- ensure more of the relevant people, rather than just any people, from the sample respond.

Web-based more common

Currently, about two thirds of the Australian population has home or work e-mail access and as a consequence, Web-based self-completion surveys have become more common. Response rates to those Web-based self-completion surveys have often been reported as if validations to the researchers' findings and initially led us to review findings from five similar surveys to see how we could further improve response rates. That review suggested the overall response rate was not the issue.

The five surveys reviewed were all online Web surveys, hosted on our Web site and accessed by clicking on a hyperlink in a personally addressed e-mail. The surveys were undertaken between February 2005 and August 2006. Three surveys were of all the e-mail-accessible customers of one financial institution, the fourth was of all the e-mail-accessible customers of a second financial institution, and the fifth sample was an Australia-wide sample of people listed in a national e-mail database. People in this database had been filtered to be adults with transactional accounts, loans or cash investments at any financial institution.

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The detail known about these surveys' samples was limited to the prospective respondents' gender, age and that they were customers at particular financial institutions. The samples thus were broad population samples and not interest- or category-specific, so had little commonality and their interest in a survey could not be assumed merely because they had supplied an e-mail address to a financial institution. In this, the samples were unlike e-mail panel members who have often supplied an extensive range of information about themselves when joining the panel, allowing the creation and contact

Table 1: One-time E-mail Invitation Response Rates

Survey	National sample benchmark survey	First financial institution Survey 1	First financial institution Survey 2	First financial institution Survey 3	Second financial institution survey, first e-mail
Response rate	18%	19%	20%	17%	18%

of like-minded or like-interested groups, whose relevance to the survey can be more directly determined before the survey is undertaken, and so mostly relevant respondents would be contacted.

Prospective participants in each of the two financial institutions' surveys were invited to complete the survey by a personally-addressed e-mail from the financial institution's chief executive officer. The financial institutions believed that their customers would feel more involved if they were invited to participate by the well-known chief executive officers.

Prospective respondents in the national sample were invited to participate by the research company director, whose identity was probably unknown to most, if not all, of the prospective respondents.

To encourage participation, prospective respondents were offered the opportunity to add their e-mail address to the last screen of the survey and enter a competition. The prizes ranged from $A1,000 or one of two iPods or 50 cinema double passes; one of 20 cinema double passes worth $A29 each; one of 10 $50 petrol vouchers; or the winner's choice of an iPod, a digital camera or a dual-screen DVD, each worth about $A500.

Content influenced who, not how many responded

Each survey was online for two weeks and prospective participants in four of the five surveys were e-mailed once only. The prospective participants in the fifth survey were e-mailed twice, a week apart. As Table 1 shows, whether the sample was that of the national benchmark study or of customers of particular financial institutions, the one-time e-mail response rates were similar - at a one-in-five level.

With the fifth survey, participants were e-mailed twice, and the second e-mail generated a further 6 percent response, giving a final response of 24 percent, confirming previous findings that increased contact increases response rates. (Commercial considerations can, of course, limit preferred research practice.)

If our analysis had stopped here, the conclusions would have been to advise clients to increase their budgets to allow a second e-mail, and not bother whether the invitation was signed by a chief executive officer or an unknown researcher, as response would be much the same. But analysis of results from the first financial institution's three surveys showed different proportions of customer returns in each sample, and these proportions appeared related to the surveys' different content.

The first survey was a general satisfaction, product awareness and product use survey, designed to provide answers across a wide range of areas. The second concentrated on financial planning use and intention, and the third survey sought personal loan potential by identifying recent furniture and electrical appliance purchase behavior. Each survey invitation had an e-mail subject line seen as appropriate. These were:

1. [Financial institution name]

Table 2: Content and Relevance

Survey	Overall survey response rate	Within the survey respondent proportions	
		% financial planning-related respondents	% furniture-related respondents
1. General, all issues survey	19%	18%	15%
2. Financial planning survey	20%	47%	NA
3. Personal loans/ funiture buyers	17%	NA	95% overall 74% furniture 73% electrical

survey. Your opinions are important. Please respond today!

2. [Financial institution name] survey on financial planning.

3. How do you buy furniture? [A financial institution name] survey.

As Table 2 shows, there were different proportions of segment respondents within each sample. These proportions appear to depend on the survey content, yet noticeably each survey generated a similar response rate and similar overall sample size, from the same universe. This supports the contention that prospective respondents are not prospective "refuseniks" but are people who will respond if and when their interest is piqued by relevance of the subject to them.

The overall reporting conclusion that could be drawn was, the larger the proportion of relevant respondents in a sample, the more effective the analysis and reporting could be for that specific issue. But there was some concern that a thesis of relevance may need to be narrowly constructed to particular behaviors (involved with financial planning or having bought furniture, for example) and so may not be of more general utility.

Was relevance more than actions?

This indicative series of responses led to a reanalysis of a second financial institution's results, where the survey was also more general in scope but the sample was of distinct segments. That financial institution's sample had been separated into three segments before the survey was undertaken. The three segments were broadly customers who:

1. had large loans or large cash investments (the profitable customers);

2. had minimal involvement (the value-neutral customers); and

3. made frequent cash transactions (the loss creators).

As Table 3 shows, the proportion of responses from each segment noticeably differed. Almost twice as many of those in the "most value" segment (because of their large loans or cash investments) responded than those in the loss-creators segment (who just used the financial institution to get cash). The segments were constructed by the financial institution and not by commonalities of the sample except in their types of interaction with the financial institution.

This suggests that the externally assigned segments do reflect ranges of relevance of the financial institution to people in each segment. These are then reflected in survey participation. Thus, the market researcher's task is to make self-completion surveys relevant to the prospects, rather than concentrating on response overall.

Table 3: Sample and Response by Segments

Segment	% in the original sample	% in the survey responses
Profitable - with loans or cash investments	36%	42%
Value neutral - little activity	32%	33%
Loss creators - cash transactors	31%	24%

Next steps

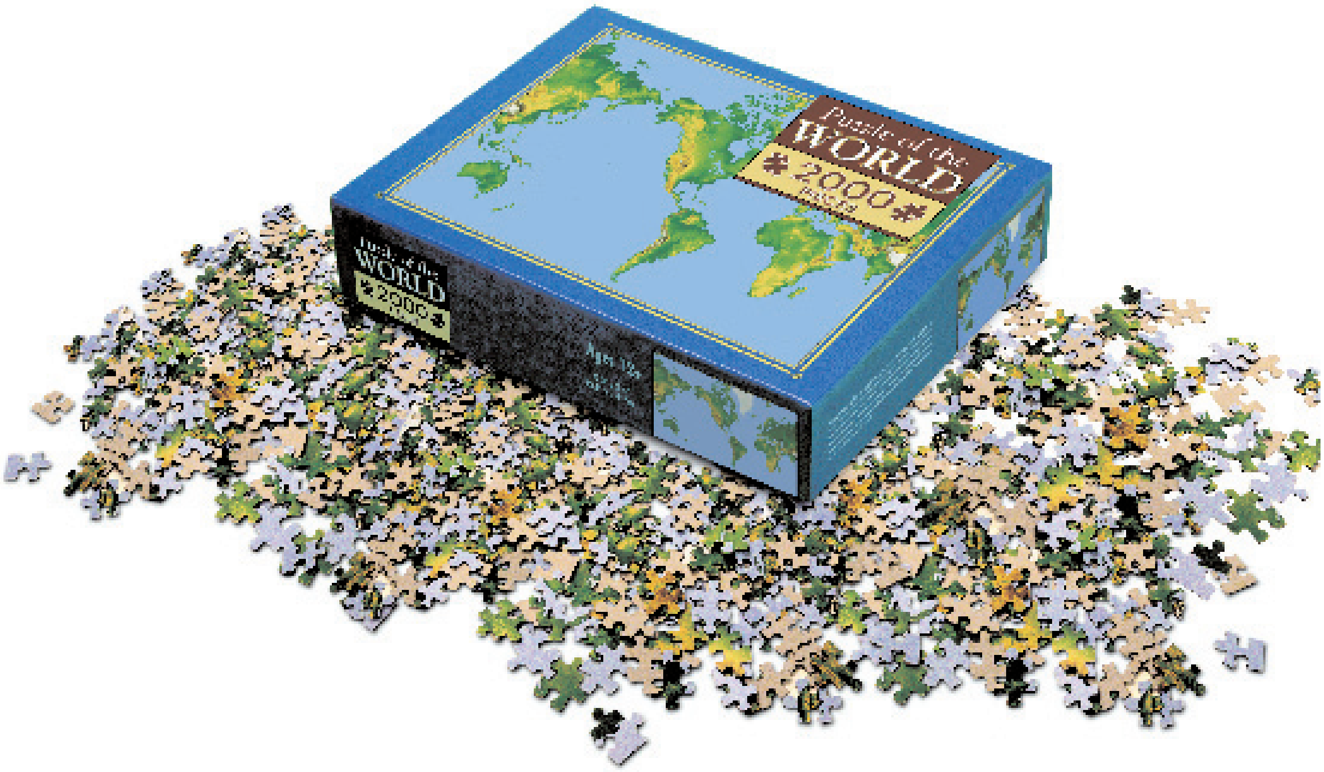
The findings from these five surveys suggest that properly designed and administered self-completion Web surveys among general populations will generate similar levels of response. What can distinguish the reporting capacity between such surveys is relevance of more of the end sample to the issues being researched.

These findings are for Australian self-completion Web surveys in the financial sector. Others may wish to review their own studies to see how widespread this pattern is.

There is a further need to determine what elements in the subject line alone or in combination with the invitation letter work most effectively to encourage response, but the overall findings suggest the market researchers' challenge is to ensure their surveys among general population samples encourage the maximum number of relevant prospective respondents to participate rather than just people in general. | Q


5,000,000 Voices
200 Countries
1 Solution

Complicated.



By Roger Blumberg

Time well spent

Ariba's satisfaction research program has made listening to the customer a company-wide habit

How are we doing? How can we do better? How satisfied are you? Those questions form the core of any customer feedback program. Last year, those were the questions my company, Sunnyvale, Calif.-based services provider Ariba Inc., needed to answer.

With over $300 million in annual revenues, Ariba includes multiple business units operating globally providing spend management services and technology for a diverse customer base. While the company is successful, factors such as fast growth, multiple acquisitions and a changing business model were causing customer care concerns for us. We were selling software and services-based solutions to companies who knew us well, but there was no comprehensive, companywide program that told us how satisfied our customers were. If a customer was dissatisfied, we weren't certain we would know about it before renewal time. We needed a better way to hear the voice of the customer (VOC) and satisfy customer needs.

After five mergers in three years, our various departments were using over five different customer survey vendors. Each program employed different tools, styles, questions and scales (1-5, 1-7, 1-10, etc.). Some used online surveys, others paper surveys.

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With no central gatekeeper to manage the process, there was a constant risk that some customers would be oversurveyed while others would rarely or perhaps never contacted. There was little organized sharing of data or follow-up. With data in so many different customer feedback programs, there was no easy way to generate reports that provided a 360-degree view of each customer. We also wanted the ability to consolidate data into roll-up reports that would guide upper management in its process improvement and investment decisions.

At the same time, Ariba's business model was changing. We were moving from being a technology provider to offer an on-demand "software as a service" solution, with much shorter, lower price-point renewal options. With 50 percent of Ariba's workforce providing services and additional delivery options, we needed to know a lot more about how well our various business units were performing.

Customer advocacy program

In 2005, CEO Bob Calderoni and Ariba's management committee (MC) established a customer advocacy program. I was tapped to become senior director of customer advocacy and the primary change agent in our fast-moving environment.

With the backing of the MC, my goal was to make customer satisfaction a primary focus of our entire organization. My charter was to:

• develop a closed-loop feedback process, in which we regularly measure customer satisfaction, take corrective actions and provide management with necessary reporting;

• create an interactive feedback forum where Ariba senior management and customers could meet, share constructive feedback and enjoy peer-to-peer networking opportunities;

• cultivate a corporate culture in which customer satisfaction and loyalty are key goals and all employees are measured on them.

My four-person customer advocacy group assumed the management of all feedback programs. As a centralized gatekeeper, we coordinate contact with the customer, ensure consistency of questions, consolidate and disseminate responses and provide tools and templates to all departments. With the support of the management committee, customer satisfaction was made top priority company-wide. My team's objectives included:

• develop and implement a robust, global VOC process, including the tools and metrics to better understand and track customer sat-

isfaction, loyalty and employee engagement;

• deliver actionable information that enables the organization to improve customer satisfaction and loyalty;

• drive profitable growth into new markets.

After approximately one year in operation, the results have been impressive:

• Customer survey response rates rose to 74 percent across all regions (from 28 percent).

• All departments and regions saw significant improvements in overall satisfaction scores. Ten percent of our customers surveyed reported an impressive two-point (out of 10) improvement in overall satisfaction.

• Millions of dollars of contract revenue have been retained, significantly boosting our growth and profitability and validating the benefits of our acquisitions - and our investment in customer feedback.

• We've developed a framework to sustain our programs in self-running mode, so we can concentrate on follow-up actions that utilize the intelligence we receive.

But perhaps the most important result is the profound change in Ariba's culture. Customer focus and satisfaction are now one of the key metrics at every level of the organization. Every department knows not only its own customer satisfaction scores but the scores of every other department. Every employee's compensation and incentives are tied to customer satisfaction. Ariba even created a Spotlight Award to honor employees who were nominated by a customer - an important measure of customer engagement. The mean overall satisfaction scores of customers who recognized an employee is one point (10 percent) higher than those who didn't. We wanted to reward those employees who were taking extra care of our customers.

Integrated program

We began our transformation by finding the right partner. After a thorough review by management, we selected CustomerSat, Mountain View, Calif., and it its CustomerSat Enterprise as the sole customer feedback solution for our firm.

After selecting CustomerSat, Ariba continued to develop its integrated customer feedback program:

• Departments not previously conducting surveys were assimilated into the new companywide program.

• A central repository of customer data was established.

• Touch rules were instituted to ensure proper frequency of surveys and to make sure the entire customer base was surveyed but not oversurveyed.

• Account managers were given access to their customers' results across all surveys.

• Leadership was provided with a dashboard of data encompassing all surveys and all customers.

Our management committee was confident that we could better serve our clients by motivating them to become more engaged. We knew they could provide real-time insights and valuable market intelligence while helping Ariba define new strategic offerings.

Measure early and often

It's crucial to measure customer happiness early and often, especially for a company like ours. We face strong competition, sudden advances in technology and a blistering pace of market change. With the on-demand solutions we now offer, our customers don't have the massive initial investment that traditional perpetual-license customers might have had to make. Lowering the barriers to entry is great from a business development perspective but we didn't have full understanding of the competitive landscape - especially without a voice-of-the-customer program to measure how satisfied customers were. But now our VOC keeps customers close. We know what they're thinking, feeling and doing. If there's an issue, we know it. We acknowledge their concerns immediately and address them promptly.

Data collection, analytics, action

Ariba's integrated VOC system has three parts: data collection, analytics and action. Data collection involves deploying two kinds of surveys:

• A semi-annual relationship survey delivers overall satisfaction and loyalty readings. If customers indicate a problem, a member of our management committee meets with

Type	Frequency	Department	Audience
Relationship Survey	Semi-annual	Customer Advocacy	Daily Sponsor at Customer
Product Tech Support Survey	End of each support case	Product Support	Site Administrator
GSO Project Survey	End of each project	Global Services Organization	Project Team
Consulting Project Survey	Every 90 days and end of project	Consulting	Project Team
Training Survey	End of training	Training	Attendees

them to follow up. Overall satisfaction scores are used by the MC for semiannual investment decisions, including hiring, new programs and services, and to initiate process improvements. Results and remedies are presented to all 1,500 employees in rolling departmental road shows.

• Transaction surveys are performed at four critical customer touchpoints, e.g., the end of a consulting engagement or training session.

The chart shows the details, participants and timing of Ariba's current survey program.

Here's a look at the steps our VOC program follows as it drives and coordinates action:

1. Survey sample is selected and exported from the central repository. Touch rules protect customers from being oversurveyed.

2. E-mail survey invitations are sent out. Respondents click on unique URLs to complete surveys.

3. Ariba-wide interactive dashboards are updated with customer feedback in real-time. Push reports periodically e-mail current status.

4. Real-time action alerts are e-mailed from CustomerSat to Ariba. Cases are opened based on satisfaction scores and customer value, and assigned to management committee members based on region and tier. Cases must be closed in seven days.

5. Decision support and service management systems are updated with latest customer data.

Results are consolidated into reports which are distributed across the company and guide follow-up action and process improvement. Customer intelligence is shared across all departments using a common dashboard and dissemination system.

Close the loop

We close the loop individually with every customer, regardless of how they rated Ariba. CustomerSat's Action Management provides us with an automated system of alerts, assignments and communications that enable our team to respond to customer concerns immediately.

Action Management automatically generates and sends action alerts to designated Ariba account teams. Dashboards are visual displays of performance data by product, region and department and communicate customer feedback data across all departments, offering a consolidated view of the results of each relationship survey. Push reports, showing trends and verbatim customer comments, are sent to individual departments, managers and MC members. Our people can quickly review all of a customer's responses and progress reports over any period of time, making it easy to prepare for an upcoming customer meeting.

At Ariba, the management committee handles the alerts of every customer who returns an overall satisfaction score of six or below. During the first two months of our program, there was a heavy emphasis on insuring these calls were made, which helped them better understand each customer's issues and concerns and made a positive impression on our customers. This improved level of communication has led to a significant increase in satisfaction scores and repeat business.

Personalized thank-you notes signed by the CEO are sent after each customer call, reiterating the discussion, commitments and progress to date and acknowledging any major changes - up or down - in the customer's satisfaction level.

A two-way street

At Ariba, customer intelligence is a two-way street. Individual account summaries, updated after each interaction, fuel interactive discussions with customers at regular checkpoints during each half-year period.

• Quarterly management review is a one-on-one quarterly presentation delivered in person by Ariba executives to each major customer. It delivers a 360-degree view of Ariba and customer engagement.

• Customer advisory councils are group discussions with 30-40 strategic accounts. These encourage customer involvement in the improvement process and drive the future

Lessons learned

• Don't hide from the results. Face and fix them.
• Close the loop with your customers, especially the angry ones.
• Give customers the option not to receive follow-up calls.
• Customers genuinely appreciate follow up, especially from senior management.
• Consider compensating your sales team to nominate customers for surveys, as well as to follow up to make sure they respond. That strategy has helped double our response rate.
• Paying a corporate bonus tied to customer satisfaction has greatly raised the awareness of the programs and employee buy-in throughout Ariba.

direction of Ariba products and services. Council participants take part in needs assessments, product testing and feedback sessions.

• Customer product focus groups, organized by geography and industry, drive feedback on specific products and services. Five formal focus groups on product and services are conducted in all geographies (North America, Europe, Asia) during each half-year cycle.

Gratifying results

Barely a year after we began, results have been gratifying. We now measure satisfaction at every touchpoint and, for the first time, measure satisfaction in our services group. Company bonuses are tied to the results of the relationship survey, as are most of Ariba's investment decisions.

We measure trends in overall satisfaction scores for the company, region, products and business units. In just one year, customer satisfaction scores have improved overall by 10 percent, with every region showing a significant increase. Five percent of our customers showed an improvement of 20 percent. Scores of 8, 9 and 10 jumped from 38 percent (Q4 2005) to 60 percent (Q2 2006).

Qualitative feedback is reviewed using CustomerSat's Comment Analyzer, which we use to develop themes and chart trends. For example, we measure the willingness of customers to act as a reference. The number of customers willing to spend detailed time with us in focus groups and at our customer councils has tripled in one year - a measure of their willingness to invest in us. Significantly, the mean overall satisfaction score of those attending these meetings has risen 15 percent.

Looking ahead, Ariba's future looks bright. We no longer have to wonder how we're doing - now we know. Thanks to our feedback process, Ariba will stay on track toward increased growth, profitability and customer satisfaction. | Q

> customer satisfaction research

By Lori Laflin and Michele Hanson

A slight change in the route

Satisfaction study is vehicle for Minnesota Department of Transportation to test question order

Created by the state Legislature in 1976, the Minnesota Department of Transportation (Mn/DOT) develops and implements policies, plans and programs for highways, railroads, commercial waterways, aeronautics, public transit and motor carriers throughout the state. The vision is to develop a transportation system that meets the needs of Minnesotans while considering available resources and local guidelines.

Understanding customer needs, perceptions and expectations and creating performance measures and tracking this progress are vital for the department's tactical and strategic decision-making.

That's where the Mn/DOT market research function comes in. To provide this information, it conducts a wide variety of ad hoc and tracking studies, including the maintenance business planning (MBP) study. Conducted for MnDOT's Office of Maintenance, the study examines highway maintenance from the public's perspective.

In 2005, after it was determined that a change needed to be made to the maintenance business planning study, Mn/DOT contracted with Stillwater, Minn.-based Readex Research to collaborate and get the Office of Maintenance the new information it needed.

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The Office of Maintenance is responsible for maintaining and preserving Minnesota highways so they are safe, structurally sound, convenient to use and aesthetically pleasing. Ongoing informational objectives of the business planning study are:

• to maintain trending data on importance of maintenance products and services, perceived performance for those products and services, how the public would allocate funding to individual services; and,

• to measure any new changes in public perception about maintenance products and services.

The study asks customers to rate importance and satisfaction overall and with these 15 specific maintenance activities: clearing roads of debris; clearing roads of ice and snow; keeping roads in similar condition statewide; ensuring road shoulders are in good condition; ensuring road surfaces are smooth and comfortable to drive on; eliminating weeds on the roadside; keeping the plants, grasses and flowers by the roadside looking good; removing litter and trash by the roadside; ensuring stoplights and stop signs are clearly visible and working; ensuring highway signs are clearly readable; ensuring guardrails are in working condition (undented and whole); ensuring road stripes and markings are clearly visible; ensuring roadway lighting works; keeping rest areas safe, clean and attractive; providing current information on unplanned or emergency highway conditions.

Fund allocation

The MBP also includes a fund allocation section which serves as another way to understand the importance of maintenance service areas. Respondents are asked to make some decisions about how they would allocate $100 between three general types of road maintenance:

• maintaining the road surface (snow and ice removal, keeping pavement smooth and keeping road stripes clearly visible);

• providing motorist services (road signs and traffic signals, upkeep for rest areas and providing current information on unplanned or emergency road conditions);

• maintaining roadsides (keeping plants and grasses neat and attractive, removing any trash or litter and eliminating weeds from the roadside).

With this information, the department was able to develop a quadrant chart showing areas for

increased emphasis (the convergence of low satisfaction and high importance) and decreased emphasis (the convergence of high satisfaction and low importance).

What level of service?

The quadrant chart was very helpful but it failed to provide answers to a key dimension: what level of service does the public require? To help allocate resources in a time of tight budgets, MnDOT decided it would be very helpful to understand what the public believes are acceptable levels of service.

Similar to the performance and importance questions, this new question would ask respondents to use a 10-point scale to rate the level of performance that would be acceptable to them to fully meet their needs, given the fact that Mn/DOT must work within a budget while at the same time ensuring that customers' needs are being met. (A score of 10 would mean Mn/DOT needs to do an extremely good job in the area, 1 would mean it could do an extremely poor job in the area and still meet the respondent's needs, and 5 would mean it would need to do an average job to meet the respondent's needs.)

Telephone interviews

A random sample of Minnesota telephone numbers was used to collect 1,001 telephone interviews,

Table 1 (mean summary)	Rating First	Allocation First
Base	*500*	*501*
a. maintaining the road surface	$54.49	$54.39
snow and ice removal	$22.82	$22.77
keeping pavement smooth	$18.22	$18.67
keeping road stripes clearly visible	$13.45	$12.94
b. maintaining roadsides	$18.42	$18.48
keeping plants and grasses along roadside neat and attractive	$5.60	$5.43
removing trash and litter from the roadside	$7.46	$7.63
eliminating weeds from the roadside	$5.36	$5.42
c. providing motorist services	$27.09	$27.14
road signs and traffic signals	$11.56	$11.58
upkeep for rest areas	$7.78	$7.64
providing current information on unplanned or emergency road conditions	$7.75	$7.91

conducted by Minneapolis-based Market Solutions Group, between February 24 and March 7, 2005. Average interview length was 16 minutes; the incidence for qualified respondents was 89 percent, and the refusal rate was 23 percent. The margin of error for percentages based on the 1,001 total tabulated responses is ±3.5 percent at the 95 percent confidence level.

The sample was stratified by district (there are eight districts which cover the state of Minnesota) to optimize statistical precision for anticipated segment-level analyses. Responses were weighted in tabulation to accurately reflect true population proportions.

Readex Research managed the design and fielding, analyzed the data and prepared the written report. Previous quantitative waves were in 1994, 1996 and 2000 by other research firms.

Apprehensions

Even though there were apprehensions about changing a tracking questionnaire, the need for this information outweighed the possible impact on tracking.

Inserting the new question series after the satisfaction ratings seemed to make logical sense. The new questionnaire order would be:

1. importance
2. satisfaction
3. NEW – acceptable level
4. fund allocation

Yet we were concerned that if there were changes to the trended data for the fund allocation section, we would be unable to determine whether the differences were due to shifts in public opinion or simply due to the questionnaire order. Given this, we thought about set-

Table 2	Rating First	Allocation First
base	*500*	*501*
OVERALL	7.5	7.6
Stoplights/signs clearly visible/working	8.6	8.4
Roads cleared of ice/snow	8.5	8.6
Road stripes/markings clearly visible	8.2	7.7
Roads cleared of debris	7.9	7.5
Highway signs clearly readable	8.2	8.0
Road surfaces smooth/comfortable	7.9	7.9
Guardrails in working condition	7.8	7.4
Roadway lighting works	8.0	7.8
Roads in similar condition statewide	7.6	7.2
Road shoulders in good condition	7.5	7.0
Litter/trash by roadside removed	6.7	6.2
Rest areas safe, clean, attractive	7.4	6.7
Current info on highway conditions	7.3	6.7
Weeds on roadside eliminated	5.6	5.0
Plants, etc., by roadside look good	5.6	5.0

Question: [Now that you have/Earlier you] rated how well Mn/DOT is doing at each maintenance activity, we would like to know one more thing about performance. What level of performance would be acceptable and fully meet your needs for [issue]?

ting up the revised questionnaire with the new question at the end:

1. importance
2. satisfaction
3. fund allocation
4. NEW - acceptable level

Because our preference would be to place the acceptable-level question in future studies immediately after the satisfaction ratings for better flow, we decided to test if inserting this new question after the satisfaction ratings and before the fund allocation would have an impact on how respondents allocated funds. To do so, respondents were randomly divided into two halves (balanced on key demographics) and the final questionnaire order was determined to be:

1. importance
2. satisfaction
3. NEW - acceptable level (half of the respondents)
4. fund allocation
5. NEW - acceptable level (half of the respondents)

No significant differences

It was with great relief that we discovered that there were no statistically significant differences in fund allocation based on the question location, as shown in Table 1.

We did, however, find something completely unexpected - a difference in acceptable level ratings. Average acceptable levels for most of the service areas were lower for those who were asked to allocate funds before rating the acceptable levels than for those who were rating acceptable levels before allocating funds.

Table 2 shows the average results for those who rated acceptable levels before allocating funds versus those who allocated funds before rating acceptable levels. Statistically significant differences are highlighted in yellow.

Affected the outcome

Based on these unexpected differences, it seems logical to conclude that the order of the questions affected the outcome of the results, with those having first allocated funds (and therefore, considering budgetary constraints) more willing to accept lower service levels than those who allocated funds after rating acceptable service levels.

And, with the help of the new acceptable level question, the results indicated that, statewide, customers believe Mn/DOT should provide additional attention to three key areas:

1. clearing roads of ice and snow;
2. keeping road surfaces smooth and comfortable to drive on;
3. making road stripes and markings clearly visible.

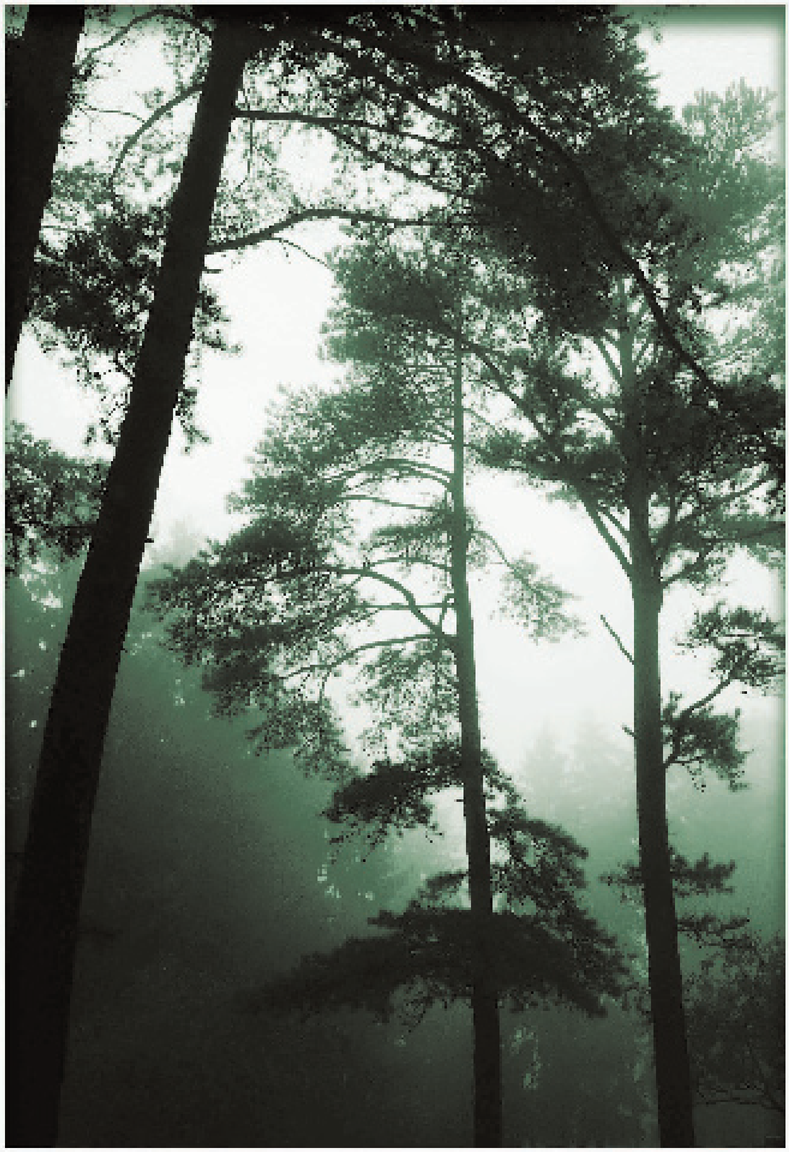
These service areas had the highest levels of acceptable performance along with the largest gaps between acceptable and actual performance.

Without the added understanding about acceptable performance levels, results of a quadrant analysis alone would have shown a slightly different scenario. For example, clearing roads of ice and snow would not have been considered an area for improvement but rather a strength because it was rated highly for both importance and satisfaction. However, by comparing the acceptable levels to actual performance, it's clear that even though Mn/DOT is currently doing a satisfactory job in this area, improvements could still be made to meet the minimum acceptable level of performance for the average customer.

Another dimension

As hoped, this new question brought another dimension to the analysis by better understanding the minimum expectations of Mn/DOT's customers. It also brought the unexpected benefit of concrete evidence regarding the importance of strategic question placement and its relationship to potential positional bias. | Q

In the fine art of research,
the shades of gray complete the masterpiece.



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The Fine Art of Marketing Research

customer satisfaction research

One goal, many drivers

By Peggy Wyllie

In an age of intense competition and shrinking customer budgets, businesses must maintain satisfied and loyal customers. Benchmarking customer satisfaction is a vital tool for helping companies learn where they stand with customers and what they need to do to achieve strategic goals. But without due diligence to identify what to measure and why, businesses can miss significant opportunities to understand the customer's experience, capitalize on goodwill and correct problems, potentially preventing defection. To add insult to injury, they can be spending hundreds of thousands of dollars while missing the mark.

Based on our experience, the key steps in benchmarking customer and employee satisfaction can be boiled down to: understand, define, detail and monitor.

Many touchpoints

Customers have many touchpoints with your company, including sales, product, support, advertising, billing and administration. It makes sense to understand to what extent their experiences with these functional areas are driving overall satisfaction with and loyalty to your organization.

For example, consider the case of one company and its customer call center. The firm had several metrics in place to continually monitor efficiency in fielding thousands of calls daily from a diverse customer base. These included the number of rings before a call is answered by a representative, the number of minutes (or, ideally, seconds) the rep remained on the phone with the customer, and the number of calls each rep was fielding each day. While these metrics delivered valuable tracking data for internal purposes, they excluded the most important viewpoint - the customer's.

Customer satisfaction and loyalty require ongoing measurement and analysis

Subsequent customer satisfaction research revealed that, while a prompt answering of their call was important, other factors trumped it in terms of influencing satisfaction. These include a perception that the representative was knowledgeable and able to adequately resolve the issue, and that customers weren't being "processed" and handed off to repeat their story ad nauseam in an attempt to fix the problem.

And don't forget the initial frustration with the product itself that prompted the call. Each interaction with the company is a building block

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for satisfaction and loyalty, so it's important to understand the linkages between them.

Understand changing workflow

Particularly with continually evolving technology, customers may be finding new ways of doing their work - which may or may not involve using your products. An excellent means of understanding changing customer workflow is the in-depth contextual interview. Conducted at the customer's workplace, the interview is a guided discussion that touches on a number of key topics, including:

• what your customers need to do on a daily basis and the tools they rely upon;

• the extent to which they use "work arounds" to make up for deficient products or tools;

• top-of-mind stories of their experiences with your products and people;

• awareness, perceptions and use of direct and indirect competitors to your products;

• expectations for changes in their workflow that may offer new opportunities for you to serve them.

Observing how customers do their work with your (and your competitors') products yields valuable insights about how your offering helps get the job done, core expectations for your products and services and, most importantly, what would delight your customers. All of this information is critical for building an actionable satisfaction measurement program.

Define key metrics

Involving your key people from various functional areas in customer interviews paves the way for a consensus in understanding the customer's world, which in turn makes it easier to collaborate across functional boundaries in the pursuit of an integrated customer-focused strategy. In addition, the rich qualitative data gathered in the interview phase can ensure that you're measuring performance and attributes that matter most to customers.

As an example, consider the company that continually measured the extent to which customers view it as "innovative" in satisfaction studies. For the salesperson, innovative might mean new or flexible pricing structures. For the account support representative, it might mean a new self-service customer Web site. For the CEO, it boils down to more frequent product releases than the competition.

For the customer, though, it can mean all of the above, something different, or nothing at all. That's why it's important to use both internal and external data to determine specific objectives for satisfaction measurement and definitions of the attributes measured. For each objective, the team should have an idea of the action that they can take based on the data. Using the above example, it's much easier to form a plan to address waning satisfaction with the ability to self-service one's account than it is to address general dissatisfaction with the level of innovation vis-à-vis competitive choices.

A helpful exercise in defining key objectives is to gather the cross-functional team in a room and, using Post-it Notes, group and prioritize objectives. Not only does this get the team thinking about what they need from the study, it provides a blueprint for the survey instrument itself. For example, if a key objective is to understand differences in product satisfaction based on the length of time customers have been using it and the frequency with which they rely on it, the researcher knows right away to include relevant background variables in the sample and questions in the survey to ensure that sufficient data is collected to conduct these analyses. Likewise, openly sharing all possible questions at the start makes it easier to determine what to drop from the study should there be space or time constraints.

Drill down

Arriving at sufficiently detailed data to meet objectives is a function both of the questionnaire and the analysis plan. While the executive team may be most interested in the overall percentage of satisfied customers (the "magic number"), it's critical to drill down and identify what's driving satisfaction and loyalty.

You don't get there by asking customers how important different attributes are to their level of satisfaction. People have a much harder time in differentiating an abstract concept like "importance" than they do in rating how satisfied they are with performance.

A strong tool for prioritizing where management action is needed to address satisfaction shortfalls is derived importance analysis, which correlates overall satisfaction to satisfaction with underlying features. Take the example of an online information product. Customers are asked their overall satisfaction with the product and then asked to rate satisfaction with a number of product features, like ability to easily locate information via search functions, timeliness of posting new information, ability to manipulate the information, etc. The resulting derived importance analysis yields a two-by-two matrix that clearly identifies where satisfaction is not meeting perceived importance levels. It also shows where customers may be oversatisfied based on the importance of the attribute. Thus, at a glance, managers can target resources for maximum benefit to customers. For further detail, derived importance analysis can be done for customer subgroups including geographic location, spending tier and functional area.

Analyzing the drivers of satisfaction and likelihood to refer (a strong proxy for loyalty) helps to unite the details and, in pursuit of understanding, present a more holistic view of customer experiences. Let's look again at the call center satisfaction benchmarking. Loyalty driver analysis showed that call center attributes like depth of support staff knowledge and timeliness of issue resolution were joined by non-call center attributes like satisfaction with products, product training and the ability of the sales force to understand needs, underscoring the idea that no function is an island.

In this case, the fact that satisfaction with the call center and the likelihood to refer remained fairly constant despite significant downsizing/reorganization of the call center and increased product dissatisfaction is a significant achievement by call center staff. Viewing the call center satisfaction data in isolation would have painted a different and less accurate picture of the customer experience.

Early indications

Most companies benchmark satisfaction with frequencies ranging from one to three years. Much can happen in the meantime, though, which is why it's important to track ongoing customer interaction ratings. Using data from benchmarking studies, companies can build and conduct brief, frequent surveys among small samples of customers to track satisfaction with drivers and provide early indications of issues that should be addressed before they grow into deal-breakers. A feature to add to these pulse surveys is an automatic alert function that notifies a point person should a customer register dissatisfaction with any element of the service they received. This allows for early intervention with the customer and faster resolution of problems. It also provides a forum for fluid measurement and adjustment of processes for product training, new release rollouts and communications, among others. | Q

customer satisfaction research

Listen to the text

By Tom Anderson

Would you spend hundreds of thousands of dollars to collect valuable customer comments and not read them? It seems unlikely, yet we have found that most companies essentially do just that, most likely because the sheer volume of text data available for analysis just isn't manageable.

However, thanks to advances in text mining software available from companies such as SPSS, Clear Forest and Leximancer, analyzing thousands of open-ended customer comments is finally possible.

The challenge

Starwood is one of the world's largest hotel and leisure companies. It conducts its hotel and leisure business both directly and through its subsidiaries. Its brand names include St. Regis, the Luxury Collection, Sheraton, Westin, W, Four Points by Sheraton, Le Méridien, and aloft.

The hotel industry is highly competitive. Customer choices are generally based on quality and consistency of room, restaurant and meeting facilities and services, attractiveness of locations, availability of a global distribution system, price, the ability to earn and redeem loyalty program points and other factors.

Starwood management believes that brand strength is among the most important factors contributing to its position as a leader in the lodging and vacation ownership industry and provides a foundation for the company's business strategy. Key to the firm's brand strength is the success of its upscale and luxury brands in capturing market share from competitors by aggressively cultivating new customers while maintaining loyalty among active travelers.

Companies seeking insights on satisfaction shouldn't overlook online and other text sources

To manage and maintain quality among its brands, Starwood operates a global guest satisfaction program consisting of about 1,000,000 guest responses per year. While the satisfaction surveys contain several rating scale questions, about a third of surveys (>300,000 guests) also contain verbatim/text comments and suggestions. This data contains valuable insights on how Starwood might further increase guest satisfaction and drive loyalty. However, reading, coding and analyzing this amount of text data was seen as impossible.

Editor's note: Tom Anderson is managing partner of Anderson Analytics LLC, a Stamford, Conn., research firm. He can be reached at toma@andersonanalytics.com. The information in this article relating to the Starwood Hotels and Resorts Worldwide Inc. text mining project was originally presented at the 2005 SPSS Decisions conference. The information relating to Web scraping and text mining in the leisure industry will be presented at the ESOMAR leisure research conference in Rome on November 5-7, 2006.

Text mining

To reap those insights, Starwood turned last year to text mining and analysis. Codes or "verbatim concepts" were created from the vast amounts of text data and these were used to model a large database. Looking at guest text responses in aggregate, using the extracted verbatim concepts allowed prediction of key measures such as overall satisfaction, "return to brand" and "return to hotel" with above-80 percent accuracy.

The analysis also allowed Starwood to see how decisions on capital investment (such as replacing hotel ventilation systems to reduce noise issues) affect guest satisfaction and likelihood of returning to the brand.

The viability of a verbal satisfaction index to be used independently or as a support to the common overall satisfaction score was also explored. This score, made up of verbatim concepts with regression weights, may represent the future of customer satisfaction research and benefit several industries.

"Starwood Hotels and Resorts were delighted to see the aggregate voice of the customer," says Rebecca Gillan, Starwood vice president, global market research and guest satisfaction. "Understanding the key words that drive verbal satisfaction can provide another important tool for general managers to ensure that a guest's stay is a great one, and being better able to judge how satisfied a guest is while they are still at the hotel provides another opportunity to make the guest's experience a positive one, which is the most important factor in the decision to return to the hotel and ultimately to drive true preference for Starwood's brands."

Three phases

In each text mining project there are typically three phases.

• Phase one is data collection and preparation. Before the text coding process can begin the text data must be put into a database structure similar to an Excel file. If the text data of interest resides on the Internet, special software for screen scraping or Web scraping must be used to harvest the data. There are commercial applications for sale, but many companies involved in text mining have their own software for this as well. The software will go to the Web sites of interest and create a database using parameters you specify.

• Phase two is the coding of verbatim concepts of interest. Most commercial coding software comes with at least one predefined dictionary. In its simplest form, coding software only counts words. However, next-generation software also looks at syntax and other linguistic qualifiers. Good coding software should be able to automatically identify double negatives, for example.

Each industry or product category obviously has its own vocabulary. Therefore for each project at least one custom dictionary is usually built. If you are using consultants for your text mining project it is important that they communicate with your management during the coding phase so that verbatim concepts can be coded properly. Otherwise there are bound to be misclassifications in the dictionaries.

• Once the coding scheme has been built phase three can begin. This is when the actual text or data mining takes place. Your data has now been turned into numerical format, and, depending on your analytical software, various exploratory procedures from the data mining/knowledge discovery discipline such as Web graphs, CHAID and neural nets can be run on the data to understand how verbatim concepts are related and what your customers view as negative or positive.

Once the data is understood, it is advisable to develop and test some hypotheses in a structured approach. At this point, without a structured analytical approach, much time can be wasted. It is important to know what questions management most wants answered and to understand

the quickest and most accurate way to get there using the data.

Understand the issues

To gain the information advantage in the new information world - where data is a commodity and any customer/guest can become a brand evangelist/terrorist by blogging or posting to Web sites - it is crucial to leverage new technology to monitor and understand the issues that truly drive brand equity and customer satisfaction.

Surveys and focus group data are just one source of customer text data. Other important sources include but are not limited to: call center and sales force records, customer e-mail complaints and suggestions, Web site submission forms, blogs and Web discussion boards.

Perhaps the most challenging source of text-based information about your company and its competitors - because it is dynamic and at least partially out the control of your marketing and PR departments - is the Web. Starwood has long known the value of monitoring and responding to customer comments on sites relevant to frequent travelers and has a full-time employee known as "the Starwood Lurker" who frequently posts on the popular flyertalk.com site.

Ready to get serious

If your company is ready to get serious about listening to your customers, here are some tips on text mining:

1. First, identify the sources of customer comments/data that your company may not be properly monitoring or reacting to. Prioritize these sources in terms of competitive advantage and importance to customers. If customers are expecting your company to react to and/or reply to this information it may also be necessary to set up a system to respond to some of these issues.

2. While 80 percent of all data is in text format, and this data usually provides a rich source of fresh insights, it is important to have some specific goals in mind before beginning your text mining project. Specifically you should think about which supporting variables are available. For instance, will you be able to identify the source of text data? The overall topic category? Is date/time information appropriate/available? If so, these considerations need to be incorporated into the data processing/collection phase as well as the analytical framework. This may save countless hours of work later on.

3. Finally, investigate which software or vendor is most appropriate for you. Vendors should have experience in your field and make recommendations on what supporting software is necessary or even customize/build collection software from scratch if necessary. They should also be able to speak candidly about how the analysis will be done and what results you should expect. | Q

data analysis and presentation

Make the results come alive

By Melissa Murray

A guide to using PowerPoint to present research findings

So you've finished that last focus group, data table or perceptual map - assured that you've collected the valuable insight your client is looking for. But your job's not over yet. A market research study is often only as good as the quality of the presentation.

Finding an effective way to communicate research results can be tricky. Amongst all the options, one thing is certain: an effective PowerPoint presentation will be the key to transforming data into insight.

Know the basics

Since 1990, Microsoft PowerPoint has been a standard program in the Microsoft Office application suite, making it the most common presentation software on the market. Although other presentation software exists (i.e., Apple's Keynote and OpenOffice.org's Impress) these programs cater to the popularity of PowerPoint by enabling users to open, view, and convert PowerPoint files right inside the program.

A PowerPoint presentation is comprised of text, graphics and objects arranged on individual slides. PowerPoint slides are somewhat of a tribute to the 35mm slide projector, a presentation tool that has become nearly obsolete. Unlike a projector, PC-based presentations give users the convenience to print slides and creatively animate slide transitions. The overall design and structure of a presentation can be quickly modified with the click of a mouse, giving users the flexibility and control to efficiently develop visual aids.

As the style, animation and multimedia capabilities of PowerPoint become more sophisticated with each new version, presentation boards and handouts are becoming less relevant in most business and educational settings. Presenters who might not otherwise use a visual aid are plugging their content into preexisting templates to create a truly interactive experience for the audience.

In spite of all the tools PowerPoint offers to aid presenters in creating an effective slideshow, the threat of "death by PowerPoint" remains a real risk. The expression has become popular for describing poor and ineffective presentations. Although personal preferences lead to varying definitions of poor, common symptoms of this condition include:

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• unnecessarily long presentations;
• slides with all text - no graphics, animation and/or white space;
• slides cluttered with clip art and/or a distracting use of animation;
• too much variance in colors, fonts, font sizes, slide format and overall style;
• too much to read - including excessive bullet points and/or run-on sentences;
• failing to tailor language, style and/or graphs to the audience;
• slides that are difficult to read by all members of the audience.

Avoiding blunders such as these can be tricky for even the most experienced PowerPoint user. Researchers face an exceptional challenge when presenting intricate qualitative and quantitative data. However, creating an effective multimedia presentation is easy with these simple hints.

Start strong

Being fully organized is essential when creating a PowerPoint presentation. Think about the purpose of the presentation and the audience who will see it before choosing fonts and colors or determining headings and content.

HINT: Choose a slide background, body text and heading placement, fonts and accent colors and apply these settings once to the slide master. To do this, click on the View menu, mouse over Master and select the sub-menu Slide Master. The slide master will become visible and you can edit fonts, colors and text-box placements. When finished making modifications to the slide master, simply click Close Master View from the floating dialogue box or click the View menu and choose Normal View to return to the individual slides.

Once the slide master is set, every slide in the presentation will reflect the same stylistic elements. Furthermore, if you decide later to change an independent characteristic of the presentation, you can modify the slide master once and instantly apply the change to all slides.

Minimize text

Although a slideshow presentation is not the substitute for a formal research report, many users type every idea they intend to share with the audience directly into the slides. This leaves very little room for graphics or essential white space and results in a text-heavy presentation filled with run-on sentences.

HINT: Combat text-heavy slides by typing up a set of presenters' notes in Microsoft Word or another word processing program. Organize the information according to how you plan to discuss it in the presentation and pull headings and bullet points straight from the notes.

Limit the amount of information on the slides to only the main points from this longer set of notes. Keep in mind that the bullets on your slide should be used as speaker's cues to help minimize the amount of verbatim reading that you do. Don't give the audience so much to read that they are distracted from what you have to say.

Think of the slides as a safety net, rather than the primary way of communicating to the audience. The bullets on a slide should help you get back on track if you lose your train of thought and the presentation should always be a supplement to the conversation you use to engage the audience. Each time you introduce a new slide, you want to create a natural transition for the audience: their attention is immediately fixed on the new slide and then gradually returns to the speaker.

HINT: Another quick and easy way to format PowerPoint material is to type directly in the Outline view. Referring again to your presenters' notes, click the Outline tab and begin typing as you would an outline, with main points as headings and indenting supporting information. Each time you press Enter in the outline, a new slide will be created with the next headline.

Have your preferences set on the slide master before typing an outline so that each new slide is consistent. Once the outline is complete, the slide show can be created directly from its content or a copy of the outline can be printed by selecting Outline View in the Print dialogue box.

Master consistency

As important as the content may be, your client will also be evaluating the stylistic consistency of your presentation. Aside from appearing unprofessional, a stylistically inconsistent presentation - one with varying headline sizes or irregular text-box alignment, for example - is incredibly distracting to an audience.

HINT: To keep things consistent, copy a finished slide in the Slide Sorter area to the left of the main slide view and paste it immediately following the finished slide, and then modify content in the main view from there.

PowerPoint will automatically number the slides and by creating new slides this way, you avoid the hassle of modifying the standard slide setup that defaults when creating a new slide. Likewise, reordering slides is easy: select a slide in the Slide Sorter area and drag it to a new position amongst the other slides.

The best way to create aesthetic consistency is by applying a premade template complete with background design and a coordinating text color scheme. If you feel you have exhausted the limited selection of ready-to-use templates in the PowerPoint program, browse and download over 700 free templates online at Powerbacks (http://powerbacks.com/).

HINT: When you find a set of templates you like, simply download the Zip file onto the desktop or your computer's hard drive. To access the template, open the Zip file, open the name of the template file inside (i.e., Gradients) until you see icons for .jpegs and .pot files. To preview a template, double-click any image (.jpeg) file. After deciding on a template you like, double-click on a .pot file with the same number and select Open to access the PowerPoint template. PowerPoint will automatically open and the new template will be applied to the slides.

In addition to using the same background on each slide, use no more than two fonts. For example, use a serif font such as Lucida Calligraphy or Times New Roman for headings and a sans serif font such as Arial or Tahoma for the body text. Using a combination of two fonts adds a certain amount of interest to the presentation and gives you a reasonable amount of creative freedom with bold or italic effects.

HINT: Make headings pop by applying a shadow: select the text, right-click, choose Font and click the Shadow checkbox.

As mentioned before, save time in formatting each new slide (every new slide created will default to black or white Arial text) by formatting the font style, color and size within the heading and body text boxes on the slide master. This ensures that the elements appearing on every slide will not shift as you advance through the presentation.

HINT: Increase your credibility by inserting your company name, the client's logo, or slide numbers on the slide master. It will appear in the same position on every slide.

The last way to ensure a professional feel during the slideshow is by choosing an appropriate slide transition and applying it to every slide. Good slide transitions include Box In, Box Out or Circle In, set to play slow. A few to avoid are the Checkerboard or Random Bars, mainly because they can become distracting in large doses. The subtle slide transitions are usually enough to spice up the slideshow, therefore individual transitional elements, such as a title heading flying onto the screen or transition sounds, should really be avoided.

Provide notes

So you've typed out all the presenter's notes in a word processor format and there's some really, really good information there. You're searching for a way to squeeze another slide in somewhere so you can be sure the audience is exposed to every last bit of valuable insight. Well, relax and refrain from slide overkill by providing that information to your audience in the form of handouts.

HINT: The PowerPoint notes feature is a great way to share notes and provide the audience with a copy of the slides. A good rule of thumb is to use the word processor program to spell-check and format your notes, making sure the content is no more than 25 lines. Once you have final text, copy and paste it in the Notes window, which is the box directly below the slide when set to Normal view.

Using this feature, you can print a set of individual slides with accompanying notes following at the bottom of the page. You will find that the audience will not only appreciate the presentation and notes organized all in one document, but you'll earn their undivided attention since you've freed them from note-taking. When presenting to a client, always print a copy of the presentation so that they can follow along and jot down questions or ideas during the presentation.

HINT: When getting ready to print your slides, be sure to select Notes Pages in the print dialogue box. Also, print first in black-and-white and proof for errors before printing copies for the client in color.

Be visually engaging

Elevating an everyday PowerPoint to a professional level requires accentuating clear, concise bullet points with media that enhances the content in a truly memorable way. An effective presentation should do more for the audience than simply bulleting the information that the speaker says - it should complement what is being verbally presented.

A major strength of PowerPoint is the ability to display photographs and play video. These visual elements are a great way to help connect the client with the research study. The sole purpose of your slides is to engage the attention of your audience as a visual aid to your verbal presentation, so when designing your slideshow, be sure you take advantage of PowerPoint's multimedia capabili-

ties.

Incorporating photographs into your presentation is easy. The minimal effort does wonders for the professionalism and quality of slideshow content. A digital camera or professional photographer is really not necessary. You can easily substitute a disposable camera to snap photos of respondents engaged in discussion.

HINT: When you develop the shots, order a photo CD and insert the photos directly into your presentation from there. Other sources of imagery to enhance your PowerPoint can be obtained online. For example if you are showcasing the state-of-the-art facility used to house a study, visit the facility's Web site and pull photographs from there. Simply right-click on the image and select Save As to save the photo or logo to your computer and insert it onto a slide.

Don't be afraid to be tactfully creative. If a slide topic is defining the perceptions of a particular target group, insert a photo that resembles that type of consumer.

HINT: A great way to locate photos like this is through Corbis (www.corbis.com), which offers royalty-free stock photography and illustrations. Registration is required, however once registered, you can browse the entire collection of images and right-click them from the site without watermarks (images have a Corbis watermark otherwise).

The site also sells volumes of CDs filled with royalty-free images that you can purchase for personal use. A CD of images is around $600, but this investment is not really necessary for presentation purposes, since a wide selection is available online with simple membership. The advantage to using a source like Corbis is the professional feel that photography will add to a presentation. Mixing cheesy cartoon clip-art and real-life photographs are a major no-no - unless of course the client's business is toys. Many presenters are tempted to use a variety of clip art, moving images and photography to liven up the presentation, but more often than not this lessens the professionalism of the slideshow.

Importing tables and graphs created in applications such as SPSS or Excel is another great way to visually engage the audience. For example, the results from an SPSS perceptual brand map are produced in an Excel macro file. The easiest way to pull such a file into PowerPoint is to first delete the statistics sheet in the Excel macro - leaving the sheet with the map only - and re-saving it as a new file. Next, on a blank slide in PowerPoint click the Insert menu and choose Object. Choose the modified file and the map will become a single piece of artwork that can be manipulated in the presentation. To maximize the visibility for the audience, increase the size of the map to the edges of the slide. The font style, color and size of the labels on the map can be modified

by double-clicking the file and changing each one individually. If you choose to modify the file, know that resizing the text often requires the text box itself to be enlarged to accommodate the larger text.

As new methods of conducting qualitative research online are evolving, new approaches to blogs and message boards are constantly emerging. PowerPoint easily enables you to display screens showcasing a blog or discussion thread. To copy a Web page onto a slide simply pull up the desired page, hold down the CTRL key and press the Print Screen button. Next, switch windows so that the presentation is active and right-click and choose Paste. The page will appear in the presentation and will likely be larger than the blank slide, so press and hold the Shift key and use the corner handles of the Web site artwork to reduce the image size.

Use technology to add a little spice

Possibly the best element a researcher can incorporate into a PowerPoint presentation is a video clip highlighting a particularly interesting point from a focus group or interview. There are a few ways to do this, however the easiest approach is to use a service that will record and catalog the focus group session for you.

InterClipper (www.interclipper.com), for example, allows moderators to record, bookmark, distribute and organize clips from the discussion. The moderator simply uses a remote to mark certain points during a recording and later decides how much of a statement should be included in a clip. When ordering this service, it is important to request that clips be saved as high-resolution and stored on a CD as a wave (.wav) or Windows Media (.wmv) file so that they can be quickly uploaded without sacrificing video integrity.

HINT: When inserting a video clip, be sure to save copies of the clip in the same destination folder housing the PowerPoint presentation (if moved to a laptop or stored on a removable storage device, be sure to save copies of the clips as well). Storing the clips with the PowerPoint file ensures that the link created in the slide remains intact for undisturbed play during the presentation.

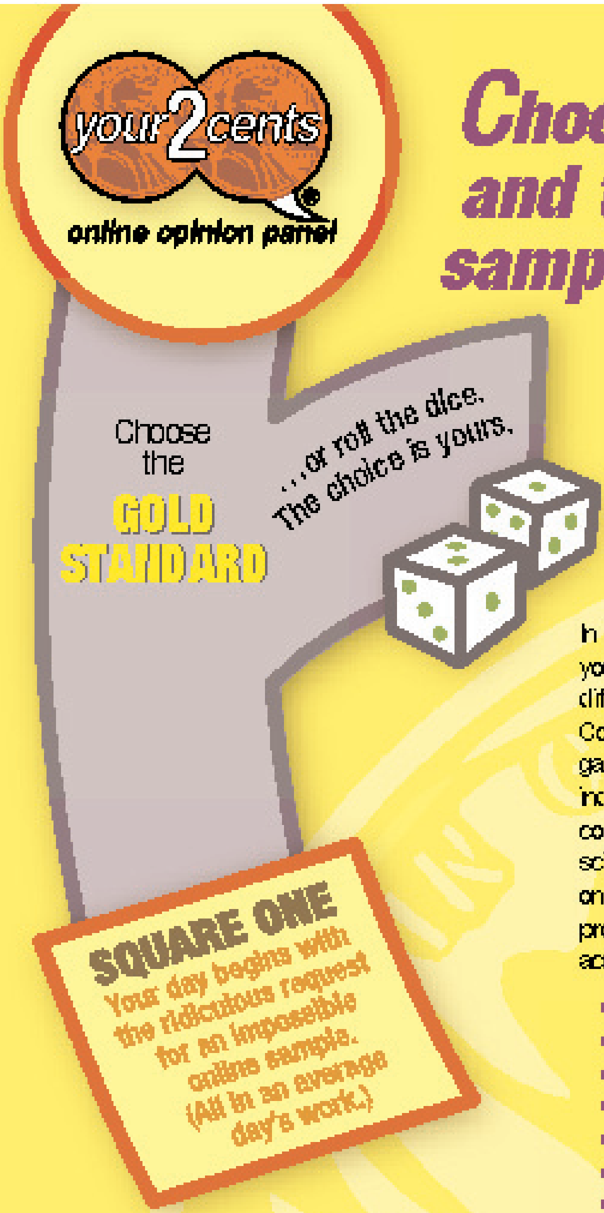
Next, click the Insert menu, choose Movies and Sounds and click Movie from File. Choose the clip intended for the slide. When inserting the clip, you will be prompted to set the movie file to play automatically or on command during the presentation. It is best to choose When Clicked simply because you can never be certain on timing during a presentation. Choosing this option will prevent the clip from interrupting a speaker or audience discussion abruptly following the slide transition.

After inserting the link to a clip, a rectangle (either black or a still of the first frame of the video) will appear on the slide. To avoid the unsightly box, reduce the box size and drag it off the slide to the gutter.

Next, you should set the clip to play on full-screen. To do this, right-click on the rectangle and choose Edit Movie Object from the shortcut menu. In the Movie Options dialogue box, click Zoom to Full Screen under the Display Options heading. In order to start the movie at your discretion, the last step is to add an on-click animation effect. To do this, choose Custom Animation from the Slide Show menu, click the rectangle, and choose Add Effect. Be sure to add an entrance effect such as Appear and move the animation to the top of the effects list by dragging it or hitting the Up re-order arrow so that it is at the top of the list of effects for the slide.

Effective tool

Using these hints, your next PowerPoint presentation can lend justice to extraordinary research, enhancing both quantitative and qualitative results. Focus on consistency and brevity and you'll produce a professional, effective visual communication tool. | Q



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motivational research

What lies beneath

By Dan Hill

Long based on focus groups, Web surveys and interviews, traditional market research relies mainly on rational verbalization of the decision process. But recent advancements in neuroscience have revealed that human decisions are primarily driven through emotional reactions which are later justified with rational thought. The underlying message is that market research as we know it was never able to tell us the whole story. Verbal input is beneficial in message creation as it allows consumers to categorize their relationship with brands and offers. But we are now aware that the decision process relies less on conscious, rational thought and more on subconscious, emotional impulse. This makes it more important than ever to quantify and leverage the emotional reactions that consumers can't - or won't - tell us.

Thankfully, as understanding of the human mind has increased, various methods of measuring emotional reactions have been developed. Facial coding is one methodology that abandons the need to rely on subjective interpretation of consumer responses. By measuring universally valid facial expressions, facial coding uses verbal input as a support, instead of the foundation, for its findings. When paired with eye tracking (which measures attention and interest by determining the visual path taken when encountering a stimulus) this method has the ability to measure both what consumers attend to when considering an offer as well as how they emotionally react to and feel about it.

Facial coding and eye tracking help uncover consumers' true responses

This article will begin by discussing various methods that have been utilized in an attempt to quantify emotional relevance. It will address shortcomings of these technologies and argue that facial coding and eye tracking are the preeminent tools for quantifying emotional buy-in. The next portion will cover advancements in neuroscientific knowledge, their implications for the market research industry and show how facial coding and eye tracking can be useful to researchers.

Numerous systems

As the research community becomes more attuned to the importance

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of emotion, numerous systems have been developed in an attempt to gauge emotional reaction and leverage the subconscious thoughts that make up much of communication. Two of the systems currently leading the charge are functional magnetic resonance imaging (FMRI) and ethnography. While both offer some insight into the decision process, neither manages to covers every angle.

FMRI measures hemodynamics (blood flow) in the brain to identify and quantify emotional response. A criticism of this procedure is that it offers no definitive emotional insight. Though we have learned more about the brain in the past 15 years than ever before, science has still not provided us with an accurate and precise guide for what sections of the brain are engaged when certain emotions manifest themselves. Until this occurs, the most FMRI can offer market researchers is an assessment of whether or not the brain attains an excited state. This binary system of response/no response simply does not offer the type of insight necessary to gain actionable knowledge of consumer emotional affect as we enter an age where experience and sensory cues will be important differentiators for consumers already overwhelmed with media stimulation.

Ethnography, the qualitative description of human social phenomena based on fieldwork, is another method that has received coverage. As it involves direct observation of subjects in real-world environs, the process succeeds in getting at the what: what consumers do, what path they take, what products they buy. It is not able, however, to address why they do these things or how they feel about doing them. Furthermore, it provides no quantitative way to measure emotional reaction. In successful market research, identifying how people feel about the offer is as important, if not more, than what they do. In an age of bottom lines and ROI, reliable, quantitative measures of qualitative analysis are imperative.

Facial coding

The facial action coding system (FACS) was developed by Paul Ekman and Wallace Friesen in the 1960s as a way to measure human emotional response to stimuli. The FACS is now used in psychiatry, by the FBI and CIA for security purposes, and by computer animators at production companies like DreamWorks.

By correlating facial muscle movement to specific emotions, facial coding uncovers the how by interpreting true consumer emotional response to offers. The system is also easily applied to real-life situations as all that is needed is a video camera to record the reaction of consumers.

Facial coding is based on facial muscle movements that accompany facial expression and emotional reaction. Human beings have the most facial muscles (43) of any creature on the planet. And the face is the only place on the body where muscles attach directly to skin, making each movement perceptible. The correlates between facial expression and emotion are so consistent that they have been found in across cultures and even in people born blind. The system takes the muscles in the face and groups them into action units (AU). An action unit is defined as the minimum, visible, anatomically-based muscle activity involved in the movement of the face. There are 23 identified AUs located across the face's three regions: 1) brow and forehead; 2) eyes, eyelids, bridge of nose; and 3) cheeks, nose, mouth, chin and jaw. Facial expressions are comprised of particular action units that singly or in combination produce facial movement. FACS correlates these facial movements with the expression of seven basic emotions: sadness, anger, happiness, fear, surprise, disgust and contempt. The method is so accurate that even false vs. genuine smiles can be differentiated.

When used in consumer research applications, study participants are videotaped viewing or experiencing the tested offer. Then a second-by-second analysis of the videotape is conducted to establish which AUs are present. Full expressions last only a few seconds, on average. There are also micro-expressions, with involuntary muscle movement "leakage" that will often reveal in a fraction of a second what the subject is actually feeling. Due to the direct relationship of AUs to emotions this process is able to determine test subject emotional response without relying on the subjective interpretation of the consumer. In short, facial coding detects real, unfiltered emotional response.

Eye tracking

The ability to determine emotional buy-in (or disconnect) is only half of the equation when it comes to the task of determining offer effectiveness. Without specific and detailed insight into what parts of the offer cause certain emotional reactions and due to the lack of human ability to provide specific information on their emotional reaction, the most market research can hope to achieve is a general sense of yea or nay. Eye tracking supplies the definite information needed by measuring what part of stimuli consumers pay attention to and for how long.

The technique uses cameras to follow eye-movement patterns in regard to a stimulus. The pupil is then triangulated on using corneal reflections to determine fixation points. The process divides eye movements into fixations and saccades. Fixations are instances where the eye pauses and holds a gaze and saccades are the movement of the eye from one focal point to another. The sequence of pauses and movements is referred to as a scanpath and is a record of where a subject looked and how long they gazed at specific parts. This technology is able to specify what components of a stimulus are the most eye-catching and determine what order images, text and graphics are taken in.

By fusing the tools of facial coding and eye tracking together, researchers can determine what parts of an offer resonate positively and negatively with consumers. This permits the creation of a more emotionally on-target (and effective) offer through the modification of existing stimuli.

Most developed sense

In evolutionary history, visual acuity ensured human survival. Early man relied on visual clues to distinguish between safety and threat, friend and enemy, adequate food supply and scarcity. Sight has therefore become the most developed of our senses, accounting for as much as 80 percent of how we learn about the world around us. Vision is so sophisticated that the rods and cones in our eyes have very specific functions - making it possible to see the panoramic big-picture view as well as to home in on fine detail - all while distinguishing between 7,000,000 colors. Perhaps the human brain has developed so extensively around perceiving and interpreting images because two-thirds of communication that reaches the brain is visual in nature.

Determining what subjects focus on is fundamental to uncovering true emotional reaction. Our sense of sight allowed, and still allows, us to survive by instantly recognizing and avoiding danger or unpleasantness. It is the first doorway of fight or flight. What people see, the context in which they see it and the order it is processed in all have implications for the emotional effect of stimuli. Eye tracking allows us to document the process by which these stimuli are taken in as well as measure the duration of attention. When used in tandem with facial coding we are able to determine specific emotional reaction to stimuli as they are viewed. The output from these methods allows research to determine, through primal response mechanisms, whether an offer is deemed as a threat or a joy.

We think in images, not words

The brain has evolved in stages. Scientists refer to the brain as triune, acknowledging the three phases of brain development along with their overlapping, but separate, functions. The limbic brain, which is the center of sensory mechanisms (as well as emotional processes), first distinguished itself from the reptile brain with the advent of mammals. This section of the brain takes in information from the senses and is where dreams occur. It processes visually. The limbic brain was in operation for millennia before the learning brain (neocortex) evolved. Language, because it is a system of abstract symbols, only became possible after the development of the learning brain. We are therefore hardwired to think in images, not words.

We don't, indeed can't, use each step of mental processing every time we encounter a stimulus. It would simply be overload for the three-pound universe residing in our skulls. Looking at mental processing in a linear manner that begins with input and ends with rational decisions is misguided. It is the ability of our limbic brain to use visual cues as instantaneous and accurate guides that allows us to survive each day. For example, look at traffic signage worldwide. Fairly similar, these signs are able to impart valuable information to people without the use of language.

Furthermore, using verbal input as the basis for qualitative research runs into issues of context. Human beings, as social animals, must rationalize their reaction and compare against norms to decide whether or not what they want to say is acceptable. Facial coding bypasses this over-analyzed verbal input by getting true reactions that occur as the brain processes sensory cues. Eye tracking tells us what these sensory cues are.

Two different routes

The traditional scientific view held that emotion came after rational thought processing. However, research by Joseph LeDoux of the Center for Neuroscience at NYU into fear circuitry suggests the opposite. He proposes that there are, in the emotional decision-making process, two different routes that we unconsciously choose in response to external events. Incoming sensory information first gets filtered through the thalamus, the screening device for the psyche, which evaluates the input for interest and relevancy. It then goes to the hippocampus where anything of any emotional significance or reminiscent of familiar associations gets in; information deemed worthless never gets routed to either the conscious, learning brain or the sensory/emotion-based limbic brain.

Sensory input is routed to one of two paths:

• The limbic path goes from the thalamus straight to the amygdala. It is more immediate, responding to sensory input prior to any conscious thought. If the sensory input has enough emotional kick to it, the limbic brain and the body work together, on instinct. They ensure that chemicals are secreted to heighten our alertness while the muscles are prepared for action.

• In contrast, on the learning path the rational brain predominates. The sensory input filtered by the hippocampus and handled by the thalamus is then passed to the learning brain. There, it gets more "rationally" analyzed - and will get passed on to the amygdala if the input has any emotional importance.

Both paths lead to the amygdala - the brain's emotional thermometer, mobilizer and short-term memory storehouse. The amygdala instructs the body to marshal its emotional resources and prepare for response. Sensory input channeled to the low

road due to emotional urgency may activate a response even before the high-road learning brain has had a chance to perform its analysis. On the other hand, even information processed by the frontal cortex and learning brain must go through the amygdala for action to be taken. No matter what path is chosen the outcome is emotion-driven action.

This is probably the most important issue that will affect how future research is conducted. Current knowledge about the decision process has demonstrated that emotions significantly drive outcomes. Conversely, current research methods ask subjects to reverse the true nature of the thought process by asking them to rationalize (think) what they feel when in reality humans feel and then think. Emotion is the driving force behind decisions no matter which path the brain uses. Eye tracking defines whether or not the correct message was delivered in the first place. Facial coding quantifies these emotional drivers and ascertains whether the intended message evokes the desired response. Together they offer the ability to create more effective emotional connections that leverage either path of the decision process by ensuring emotional importance and relevance.

The subconscious dominates

As Gerald Zaltman discussed in his book *How Customers Think*, cognitive scientists estimate that at least 95 percent of our thought processes aren't fully conscious. Conscious thought is merely the tip of the iceberg. We are, therefore, much less in control of our decision-making than we believe. For marketers, this means that appealing to consumers on a conscious, rational basis and asking them to evaluate features, attributes and benefits is largely incorrect. To reach consumers and turn them into loyal buyers you must appeal to their emotions. For researchers, it means that self-report scores such as those used in Internet surveys, clipboard questionnaires and the like are not reliable.

The issue at hand in current research methodology is asking subjects to consciously verbalize their internal thoughts and feelings. But if the subconscious controls most of thought it is technically impossible for most consumers to give accurate assessments of their thoughts, feelings and reactions; they simply don't have access to the underlying cause and motivation behind their decisions. The main implication for research is that consumers simply can't think what they feel; they can only feel what they feel. By avoiding complete reliance on verbal responses which aren't necessarily relevant to internal feelings or thoughts, facial coding can deliver accurate measurement of true emotional response. It provides quantitative measures of a qualitative subject by simultaneously uncovering how a consumer feels and measuring the frequency of emotion present. Eye tracking is able to mirror the subconscious journey that is taken visually. When the two methods are combined they provide emotional insights that sync up with actual visualization patterns. In other words, no longer do you have to rely on subjects claiming a certain thing caused their reaction; it is possible to know specifically what the catalyst was.

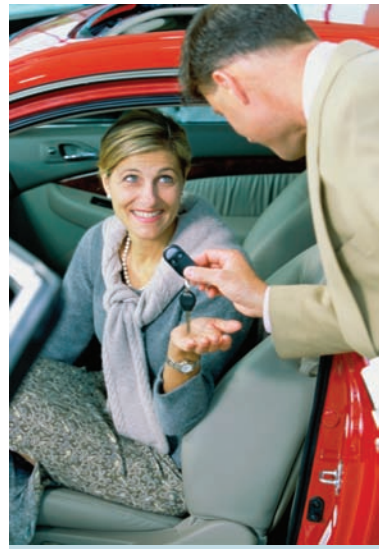
Two-thirds of communication is non-verbal. Most communication experts agree on this statistic - a percentage that jumps to 90 percent when the topic has some emotional weight to it. Humans developed the capacity for verbal communication relatively late in the game. The capacity for word-based communication came with the development of the neocortex - the most recently evolved part of the brain - which is capable of processing abstract thought. Until then we relied on sensory signals to assess and gestures to communicate. According to Edward T. Hall in *The Silent Language*, there are 10 primary modes that humans use to communicate, and only part of one of those modes involves actual verbal language. Verbal communication is routinely influenced by non-verbal signals we deem to be more credible.

Not providing what it promises

By not taking non-verbal response into account, most current market research methods disregard almost two-thirds of human communicative potential. By focusing mainly on verbal and - as neuroscientific advancements have shown - not particularly reliable means of communication, research that is supposed to be qualitative in nature is not providing what it promises. Facial coding leverages this often unaccounted for non-verbal communication to create qualitative data that needs no support from subjects but instead relies on their internal desires and feelings. |Q

automotive research

A fickle but valuable segment



Study looks at what drives first-time car buyers

By Lonnie Miller
and Jeff Martini

For most individuals, it has been said that buying a vehicle is the second-most important and expensive purchase, next to the acquisition of a home. For those just entering the car market, this is often simply the largest investment they will have made to date. To the auto industry, first-time buyers (FTBs) provide the chance to create positive impressions that will undoubtedly be reflected upon in later years as they make subsequent vehicle decisions. For players in this industry, much is at stake by not understanding FTBs given the future monetary contributions these individuals will make over the course of their lives. Based on past Polk studies, actual repeat buying (i.e., loyalty) behavior has repeatedly shown that young vehicle buyers are particularly fickle and less loyal to a brand than their older counterparts, thus adding another layer of challenge to capturing this consumer segment.

To say the least, it is an immense challenge to influence car and truck buyers overall, let alone those coming into the market for the first time. Part of the dilemma relates to effectively communicating relevancy and value to someone who is examining this category with little or no serious experience. Whether it is a new or used vehicle, the list of considerations can be overwhelming before a vehicle selection is made.

From a reach strategy, traditional media does not always support the needs of automotive marketers. Alternatively, special efforts are given to target FTBs and those influencing this audience through large-scale auto shows, clinics and test-drive events. As an example, in January 2006, both Los Angeles and Detroit hosted internationally-monitored auto shows which revealed many new production and concept vehicles for consideration to the public. Additionally, the annual Specialty Equipment Market Association show in Las Vegas highlights accessorized vehicles and their components, with the goal of showcasing how a vehicle's look and/or overall performance can be enhanced. Each of these venues, while addressing the market overall, are also designed to intercept young buyers in order to influence their subsequent purchase decisions.

One timely example of possibly hitting the FTB audience at the right moment relates to a popular small car model. At the time of this writing, the newly redesigned Honda Civic was named as one of the top three vote-getters for the 2006 North American Car of the Year Award[1]. Ideally, such an award, if ultimately achieved, will heighten the considera-

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Connect with respondents more efficiently
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tion for this model among a coveted group of buyers. For those between the ages of 18 to 24, the Honda Civic and other comparable models fall into the "segment of choice" for this young group. With an average of 25 percent of all new registrations among 18-24-year-olds coming from the small-car category[2], this type of public attention can help break through to a very desirable audience.

When first-time buyers enter the marketplace, the realities of the transaction and cost of ownership must be balanced against the dream cars they've typically imagined themselves driving. Choices must be addressed and balanced by a series of pragmatic questions, such as:

• How will I finance the vehicle and what will be the monthly payments?

• Will my family help reduce the cost?

• What are my financing options?

• Will I get the car or truck I really want?

• How will the cost of accessories, insurance and other factors, like the price of gasoline, affect my budget?

It is safe to say that some or all of these issues pose a daunting challenge for a brand-new buyer. It's equally daunting to automakers, dealers, finance companies and media organizations, among others, who wish to better understand if they can effectively serve such a prospect.

So what are first-time buyers doing during their search process for a new or used vehicle, and what's prompting them to enter the market? These questions, among others, will be addressed in the following discussion in order to reveal current behaviors and attitudes among the FTB segment.

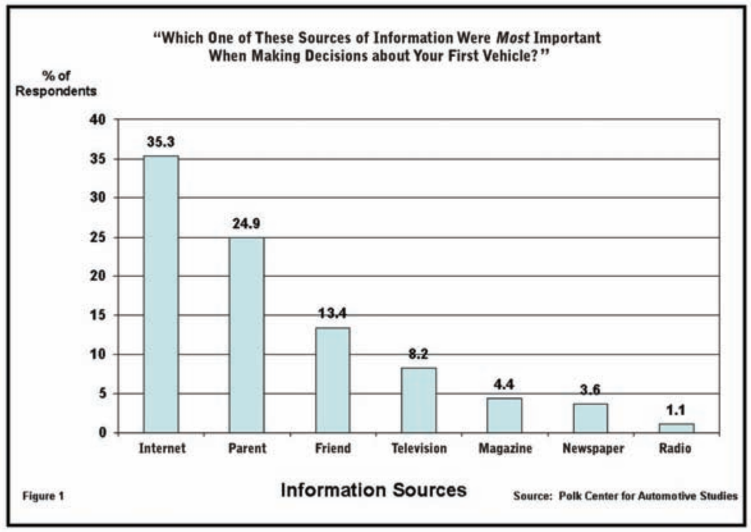


Figure 1

Source: Polk Center for Automotive Studies

This study focuses on recent views among 366 U.S. consumers between the ages of 18 and 30 who were first-time buyers or lessees of a new or used vehicle in the past two years (since October 2003). Market insights in this study come from an Internet-based public opinion poll conducted by the Polk Center for Automotive Studies during November 4-10, 2005.

Information-gathering: "surf's up"

Less than a generation ago, searching for automotive information focused primarily on media sources such as newspapers, print advertisements, radio and television. Potential customers also relied on word-of-mouth and advice from peers and family, as well as surveying vehicles at the local dealerships.

No doubt, these avenues are still leveraged today. However, over the past decade the Internet has changed everything. Today, a wealth of vehicle-related Web sites, message boards, review sites, chat rooms, and blogs are available at the touch of a fingertip. With time being finite, using the Internet as an information provider has replaced personal time that was once allocated toward traditional media.

For those addressed in this study, participants were asked about the importance of various sources of information during their decision to buy their first vehicle. As depicted in Figure 1, results show that 35 percent of respondents consider the Internet to be the most important source of information - a higher percentage than is attributed to television, radio, newspaper, and magazines combined. With a relatively young, technology-savvy segment in this cohort giving such a high priority to the Internet, this finding continues to challenge conventional media outlets that have been in place for decades.

From a regional view, almost half of the respondents in the Western region of the U.S. (45 percent) pointed to the Internet as a very important source of information, the only region higher than the national average (35.3 percent). Supporting this finding, according to the U.S. Census Bureau's report on computer and Internet usage, the Western region of the country has the highest percentage of homes with computers and Internet access[3].

Additional findings from this current study show that FTBs with a higher level of education and income are more likely to mention the Internet as a "very important" source. However, marketers should not assume that lesser-educated individuals or those with lower incomes prefer to avoid the Internet as their top informational source. It is wise to realize that those with access to it tend to use it. So with availability and usage of technology in mind, the opportunities to capitalize on alternative media are equally important to all strata of first-time buyers.

Family influence

While over one-third of respondents say that the Internet is the most important source of information when making decisions about their first vehicle, this is rivaled by the influence of friends and family. As shown in Figure 1, a combined 38 percent consider recommendations by their parents (24.9 percent) and friends (13.4 percent) to be the most important source. So while respondents in this study may belong to the much discussed Gen Y target, which embodies a group who prides itself on independence and being on the cutting edge of what's new, do not assume the immunity of their influence from trusted relationships. This has two implications:

1. Word-of-mouth strategies will still matter to an independent, tech-oriented audience.
2. Communication strategies which build trust among family members about a vehicle (and related investment requirements), should be prioritized.

Cars are passed down too

Not only is information passed readily between the household generations, but so are the cars and trucks themselves. As shown in Figure 2, over one in four (26.2 percent) entering the market to acquire their first car is doing so because a hand-me-down vehicle would no longer operate. This implies quality and durability messages have the opportunity to also resonate with a younger audience, and not just with an experienced buyer base. To automakers, a point in loyalty gained because a reliable vehicle kept a customer in the brand is worth multiple millions of dollars. Earlier impact analyses by Polk indicate the collection of all domestic makes gain roughly $1.1 billion in revenue for every point in loyalty gained. For the aggregate of all European makes, it is an incremental $141 million gained and for Asian makes, the windfall is another $571 million.

Worth noting in Figure 2, nearly one in five (19.4 percent) of all responding first-time buyers indicate they acquired a vehicle simply because "it was just time" based on them becoming of driving age. And among respondents age 18 to 21 years old,

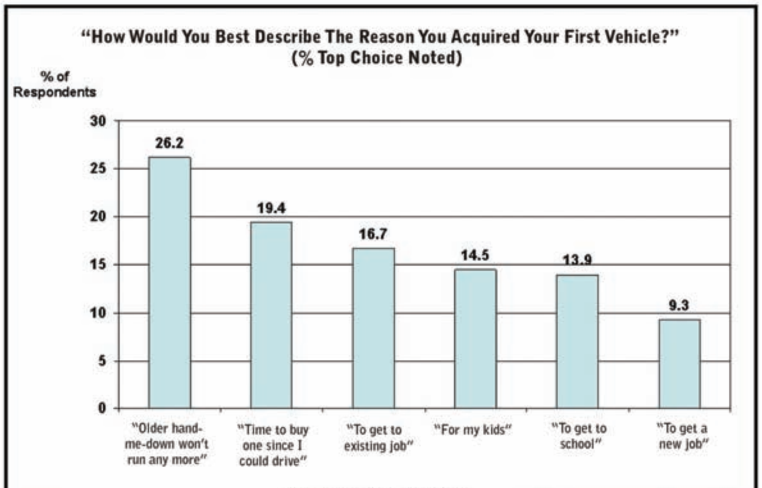


Figure 2 Source: Polk Center for Automotive Studies

over 41.8 percent state it as their top reason for entering the market. In contrast, only 15 percent of those between the ages of 22 and 30 years old indicate it as their main reason for buying. This finding reaffirms the need for demographers and market planners to track aging youth. The closer individuals get to driving age, the more their potential need for a vehicle increases.

Influencing factors

When a first-time buyer identifies their need to enter the market, what are some of the issues they consider in making their first purchase? Respondents were asked to identify the importance of several items as they made their initial buy. Several factors related to economics and personal services were addressed and are summarized in Figure 3.

Results show two understandable dynamics at play: how much one will pay (on a monthly basis) and how well one is treated. For FTBs, the financial issue tops the list as being more important than the dealer experience, yet the latter should not be neglected, especially given the number of future buying years possessed among this segment.

Despite the earlier mention of parental influence on FTBs as solid sources of information, over half (54.1 percent) indicate where their parents bought in the past is "not at all important" to them (i.e., only 6.8% said this is a "very important" consideration). This hints at some limits to the extent which families may control or influence the total purchase process.

Regarding the same set of issues, results offer interesting regional differences to the consideration list, especially as it pertains to those in the Southern region of the U.S.

Table 1 illustrates how respondents in the South place more importance to each consideration at a higher rate than the other U.S. regions. Those in the South place particular importance on being treated well at the dealership. Over half (56 percent) say this is very important, while approximately one-third of the rest of the nation feels the same way.

Bringing earlier thoughts into this discussion, respondents in the Southern region are most likely to consider various forms of traditional media - television, newspaper and magazine - as a very important source of information. With regard to peer recommendations, Southern respondents also consider their parents to be very important, while FTB respondents in the Northeast place a particularly high importance on friends' recommendations.

Reaching a goal

Ideally, a buyer ends up with the vehicle they were seeking all along. Respondents were asked about whether they got the vehicle they

intended to buy, as well as the level of autonomy they had in selecting their first car or truck. Figure 4 shows that nearly two-thirds (64.5 percent) state they had the "final say" or decision in acquiring the type of vehicle they bought. At the same time, nearly half (47.8 percent) of all respondents strongly agree they got the vehicle they wanted. Again, this level of purchasing success implies buying power that should be respected and leveraged when interacting with FTBs.

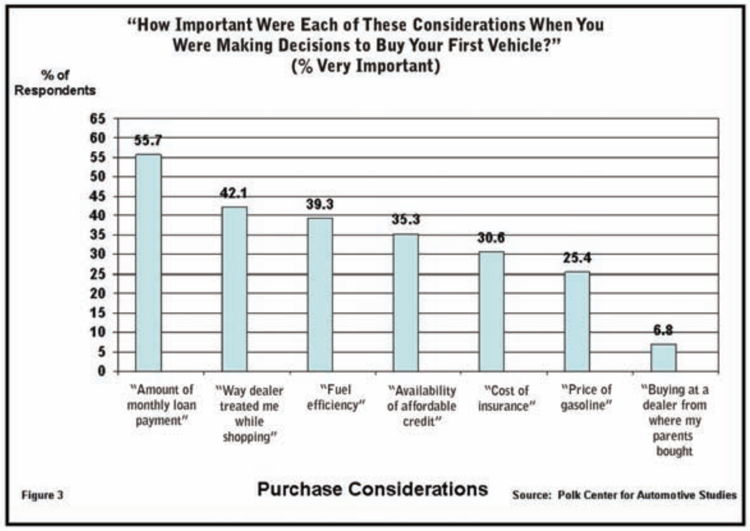


Figure 3 Purchase Considerations Source: Polk Center for Automotive Studies

Credit is important

Over one-third (35.3 percent) of all respondents consider the availability of affordable credit (i.e., good interest rates) as a very important consideration to them when buying their first vehicle. Expanding on this idea, respondents were further asked about financing specifics supporting their initial acquisition.

Overall, 54.9 percent of all FTBs state they took out a loan to pay for some or a partial amount of the vehicle. As expected, this behavior is even more pronounced when comparing those who picked up a new vehicle versus used vehicle buyers. In the case of those acquiring a new car or truck, 65 percent took out a loan, while only 46 percent of used vehicle buyers decided to do the same.

On the opposite end of the continuum, just 27 percent of respondents paid cash for their vehicle. Lastly, support from the family did not rate high as only 18 percent of FTBs received complete financial support from family or friends.

In total, better than half (57.7 percent) of FTBs financed their vehicle through the dealership. Trailing this venue, an additional 33.8 percent took out an auto loan financed through a bank of their choice. Worth noting, among "loan customers" in the Midwest, just fewer than 42 percent took out a traditional auto loan financed through a bank (as opposed to working through the dealership). Compared to the other regions, the Midwest shows the highest level of this type of behavior regarding loan sources.

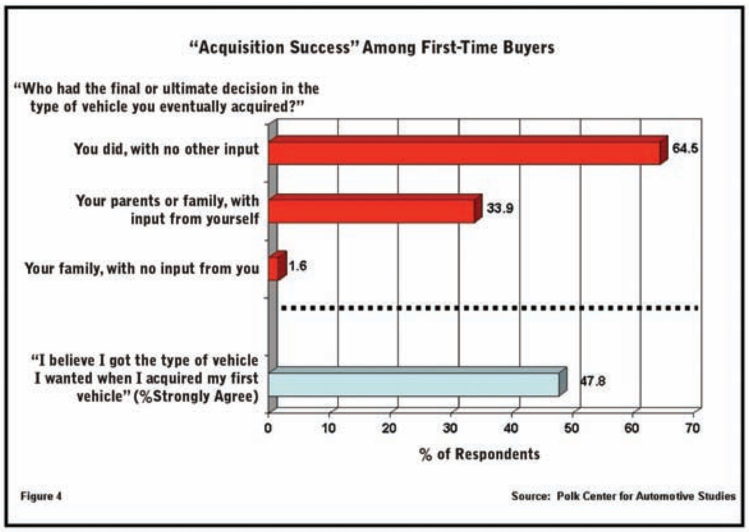
Drivers come of age

In a *BusinessWeek* article published in 1999, auto executives discussed their strategies to appeal to the Gen Y audience as it was estimated at that time that four million new drivers would come of age each year until 2010[4]. No doubt, this target is still in the sights of many automakers and that their affiliated organizations continue to pursue new, long-term revenue streams of future buyers.

According to the above, the U.S. market has roughly another four years of this four million annual target coming of age for the benefit of the auto industry. In one regard, this puts the potential into perspective: millions of fresh, new customers to

Table 1: "How Important Were Each of These Considerations When You Were Making Decisions to Buy Your First Vehicle?" (% Responding "Very Important")

	South	West	Midwest	Northeast
Monthly Loan Payment Amount	61%	56%	52%	49%
Dealer Treatment	56%	36%	32%	34%
Availability of Affordable Credit	43%	30%	30%	34%
Fuel Efficiency	43%	35%	36%	42%
Cost of Insurance	37%	26%	30%	25%
Price of Gasoline	30%	18%	30%	22%
Buying Vehicle at Dealer Where My Parents Buy Their Cars	11%	0%	8%	8%



be reached and battled for on an annual basis, yet companies struggle to absolutely dominate the category of first-time buyers, many of whom can be captured by simply knowing their birth date. Whether a 16-, 18- or 30-year-old, a consumer new to the auto buying scene has a lot to give - if they are addressed in a relevant and timely manner. With that in mind, we offer the following suggestions to various stakeholders in the automotive industry.

• *Message development and media*
Blend a mix of interactive opinion leaders into an overall communication strategy. Taking a cue from the reliance on the Internet as well as parents/friends, use this to justify how a message framework could be developed. As has been done by some automakers, leverage how FTBs, especially those associated with the Gen Y audience, will respond to interactive offerings which present iconic or cultural leaders in the medium. As many youth-oriented automotive brands build a grassroots presence with event marketing, it is also important to look for ways to appeal to the tech-savvy side of these buyers who want validation through thought leadership that they can identify with in an easy manner. As revealed by earlier findings, FTBs "want what they want" and being able to visualize themselves into successful buying scenarios is important.

Consider creating a "voice of the family" when speaking to this audience. For example, allowing print media to depict the concerns of parents to their independent and maturing children may appeal to FTBs who still respect family values and the advice of others who have been through the vehicle buying process.

Think twice if communication strategies to reach FTBs exclude interactive or online approaches in a media plan. While a seemingly obvious point, it is easy to sometimes get caught in the trap of relying on traditional media (e.g., radio, newspaper) because it is what has been used so often for a given automotive nameplate or related demographic. This has implications to dealer marketing efforts which have not invested yet in such strategies. For the first-time buyer, it appears an online communication outlet is a must-have component to effectively reach them. Again, think about how they search and what they value.

• *Financing organizations*
Related to the message development discussion, captive finance companies (related to an OEM), banks and other independent financing organizations might test how sympathetic they appear to this segment, based on acknowledging financial limitations facing young buyers. It appears to be one way to gain credibility with FTBs since they place considerable importance on the payment factors. Aspects of value should be conveyed but not at the expense of appearing cheap or discounted in nature.

From this study, a deeper regional evaluation seems to have merit. Because a higher share of respondents in some parts of the U.S. favor taking out auto loans through traditional banks (and not via dealers), it may be worthwhile to investigate the driving factors behind this behavior. At this point, no conclusions can be drawn about why a FTB seeks loans via a bank as opposed to through a dealer or whether this behavior is on par with other vehicle buyers.

• *Dealer communities*
As seen in other market studies, the interaction with the dealer plays an important role on future business and referrals. Don't neglect the amount of preparation that this ambitious and independent audience may have done prior to entering the showroom.

Some in the industry feel that loyalty does not exist. Overall brand loyalty, let alone loyalty to an automotive retailer, can be a dream when counting on business from young buyers. As noted earlier, FTBs give little regard to where their parents bought a vehicle, so do not assume younger offspring or relations to a more mature buyer base will come to the same showroom as their elders.

Genuine connection
It comes down to choices and the ones made early on in life tend to be remembered well, especially if they reinforce a bad call. For the auto industry and affiliated companies pursuing this segment, much is to be gained if a genuine connection can be made with first-time buyers. Being creative, respectful and sensitive to this group is well-worth the effort. If such an effort is not made, these may be decisions this target won't forget - possibly at your brand's expense. | Q

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Survey Monitor

continued from page 8

blow."

The survey showed that the leading gas/money-saving strategies employed by consumers making above and below $50,000 per year include taking fewer shopping trips, shopping closer to home and shopping for sales more often.

"These consumer trade-off strategies mean retailers and manufacturers may be facing difficulties in forecasting sales and projecting inventory," says Pilotta. "As consumers strive to save money, they are more willing to make sacrifices, like buying house-brand products over name brands, for example. To stay on par and remain competitive, many companies will need to look toward coupon programs, both online and off, as well as other value pricing strategies to make a shopping trip worthwhile for consumers who are driving and spending less."

"As a result of fluctuating gas prices, are you doing any of the following?"
(Respondents could select more than one answer)

	$50K + (2,657 respondents)	<$50K (3,917 respondents)
Buying more store brand/generic products	18.3%	30.5%
Doing more comparative shopping online	18.1%	14.8%
Doing more comparative shopping with ad circulars/newspapers	22.6%	27.1%
Shopping closer to home	37.7%	43.4%
Shopping for sales more often	31.3%	38.3%
Shopping more online	14.4%	11.0%
Taking fewer shopping trips	42.7%	49.3%
Using coupons more	22.7%	28.8%
Other	5.4%	6.0%

For more information visit www.bigresearch.com.

Mass-transit users love their portable electronics

An analysis of mass-transit users and "power pedestrians" by Scarborough Research, New York, finds that they are more likely than the average consumer to plan to purchase portable electronic devices such as MP3 players and PDAs, as well as to use wireless Internet. Also, these consumers have more opportunities to make purchases. They have the power to buy in the palm of their hand with the personal electronic devices, and their on-the-go nature simply may place them in closer proximity to retail outlets. Mass-transit users and power pedestrians

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account for about 22 percent of consumers in the 75 local markets measured by Scarborough.

The Scarborough analysis examined mass-transit users - subway riders in cities that have subway systems (New York, Philadelphia, Washington D.C., and Boston) and rail riders in cities that have railway systems measured by Scarborough (Baltimore; Boston; Denver; Fresno, Calif.; Harrisburg, Pa.; Hartford, Conn.; Los Angeles; Miami; New York; Philadelphia; Portland, Ore.; Providence, R.I.; Sacramento, Calif.; Salt Lake City; San Diego; San Francisco; Seattle; St. Louis; Washington D.C.; West Palm Beach, Fla.; and Wilkes-Barre, Pa.). The study also examined power pedestrians, defined as consumers who walked three or more miles in a city or town during the past week.

According to the Scarborough analysis, today's mass-transit users and power pedestrians own or plan to purchase a variety of portable technologies. Subway riders, for example, are 93 percent more likely than the average consumer in subway cities to plan to purchase an MP3 player. Rail riders are 62 percent more likely than other consumers in Scarborough's rail markets to plan this purchase, and power pedestrians are 44 percent more likely to plan to buy this portable player. Personal digital assistants are also popular among the transit audience. Subway riders are 48 percent more likely than the average consumer in cities with subway systems to own a PDA. Rail riders are 65 percent more likely than other consumers in Scarborough's rail markets to own a PDA, and power pedestrians are 16 percent more likely to have this item.

The mass-transit user or power pedestrian could access a variety of content through these personal portable devices, as, across the board, they are more likely to have wireless Internet access.

Purchases via the Internet are extremely popular with the mass-transit set. Subway riders, for example, are 27 percent more likely than other consumers in subway markets to have spent $2,500 or more on Internet purchases during the past year. Power pedestrians are 26 percent more likely than all consumers to be in this spending group. They also buy in high-end retail categories online - such as jewelry, automotive and travel.

Today's mass-transit user is young, affluent and ethnically diverse. For example, subway riders are 39 percent more likely than all consumers in subway markets to be ages 18-34 and 15 percent more likely to have an annual household income of $150,000 or more. They are also 75 percent more likely to be African-American and 58 percent more likely to be Hispanic. Rail riders are 26 percent more likely than all consumers in rail markets to be ages 18-34 and 41 percent more likely to have an annual household income of $150,000 or more. They are 75

percent more likely to be African-American and 37 percent more likely to be Hispanic. Similarly, power pedestrians are 14 percent more likely than all consumers to be ages 18-34 and 21 percent more likely to have an annual household income of $150,000+. They are 22 percent more likely to be Hispanic.

There are several advertising categories that stand out among mass-transit users and power pedestrians. Subway riders are avid travelers, as they are 45 percent more likely than other consumers in subway markets to have taken three or more domestic air trips during the past year. Subway riders are 32 percent more likely to have eaten in a fast-food restaurant six or more times during the past month. Similarly, rail riders are 56 percent more likely than other consumers in rail markets to have made three or more domestic air trips during the past year, and they are 17 percent more likely to have eaten at a fast-food restaurant six or more times during the past month. This group is 14 percent more likely to be from households that spend $150 or more on groceries weekly. For more information visit www.scarborough.com.

Feel free to market to us, say phone-using teens

Research by San Mateo, Calif.-based Mobilitec, a provider of software that lets mobile service providers offer content to their subscribers, has found that teens don't mind being marketed to by their mobile phone service providers.

That finding was one result from the firm's new global research project, The Lab at Mobilitec, which consists of a group of 11 teens from around the world who complete a monthly task using their mobile phones. Each month the participants find, access, use and pay for different types of mobile content. Mobilitec asks them to provide feedback and rate their experiences at every stage of the process.

In their first assignment, Mobilitec asked The Lab members to use their phone to download four mobile games: two specific games (JAMDAT Bowling, PacMan or Tetris) and two games of their choice.

The Lab members used the Internet as their benchmark for a good mobile experience. They expected the ease, speed, graphics, sound and marketing that they get on the Internet. They were frustrated when downloading a game took over 10 seconds or the graphics weren't as good as a computer.

All the teens experienced some challenges in finding, downloading or playing games but they expected a learning curve and had the confidence to continue until they figured it out. Three teens had to call customer service to get help; two could not find the games on their phones after purchasing them, and one had to wait five days for an e-mail response. But when it came to rating the overall experience, the average

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rating was 3 out of 5 or "good."

The teens were surprised that there weren't more games that tied into the brands they recognize. They were looking for television and movie tie-ins as well as games they had played on their computers or game consoles. This finding suggests the importance of mobile operators visibly and aggressively marketing branded content.

"The teen demographic is hugely brand-aware," says June Bower, vice president of marketing for Mobilitec. "The teens are looking for brands they know from movies, TV and games they play on their PC or game console. Teens judge quality and relevance through brands. The teens didn't know how to make a decision on what to buy when they were presented with a long list of games that were completely unfamiliar to them."

Most of The Lab members enjoyed the games they bought. And most named other games they would like to buy. They all felt the price, $2 in India to $7 in Europe and the U.S., was too high for length and quality of the games. Many requested more color and better graphics.

Growing up as the Internet generation, 100 percent of The Lab members expected to be marketed to on their phones, just as they are on the Internet, TV and other media. They anticipated advertising or special offers. They wanted e-mail and SMS telling them about new games, good deals and ways to rate and share games they liked with other teens.

"We were surprised to learn that the teens wanted to be marketed to as part of the mobile experience. The Internet generation not only expects but wants to be reached with advertising and special offers that are personal and relevant to them," says Margaret Norton, president and CEO of Mobilitec. For more information visit www.mobilitec.com.

We are a nation of cyberchondriacs

Searching the Internet for health care information has become more widespread in the past year after three years of little growth, according to a nationwide Harris Poll from Harris Interactive, Rochester, N.Y. Use of the Internet to search for health-related information by online U.S. adults has increased markedly both in terms of percentages (from 72 percent in 2005 to 80 percent now) and in numbers. This brings the number of all U.S. adults who have ever searched for health information online (Harris Interactive refers to them as cyberchondriacs) to 136 million, a 16 percent increase from 117 million in 2005.

The percentage of cyberchondriacs who search online either often or sometimes appears to be rising modestly. Most adults who have ever looked for health information online claim that they have been generally successful in finding what they are looking for. In addition, many believe the information to be at least somewhat reliable, though the percent who think the information is "very reliable" has declined. Somewhat fewer adults say that they are talking to their physicians about the information from the Internet.

The main reason for the increase in online health information searches seems to be that the total number of Internet users has increased somewhat (from 74 percent of all U.S. adults in 2004 to 77 percent now) and the percent of those looking for medical information is increasing as well. Cyberchondriacs now represent 80 percent of all online adults, up substantially from 2005's 72 percent.

Six in 10 (61 percent) online adults say that they have looked for information about health topics often (21 percent) or sometimes (40 percent), a slight increase of three percentage points from 2005 (58 percent).

The percentage of online adults who say they hardly ever or never search for health information has dropped to 39 percent, down from 43 percent in 2005.

Interestingly, while three-quarters (76 percent) of those who have ever searched the Internet for health information have done so one or more times in the last month, this is down from 2005 when 85 percent said that they had gone online one or more times in the past month looking for health information.

On average, a cyberchondriac searches the Internet five times per month, a decrease from the almost seven times per month a year ago and similar to five times per month in 2004.

Similar to 2005 a large majority of cyberchondriacs (88 percent) continues to indicate that they were successful in searching for health information online. Forty-two percent say that they were very successful and another 46 percent say they were somewhat successful.

Eighty-seven percent of cyberchondriacs say that the health information they found online has been reliable (25 percent "very reliable" and 61 percent "somewhat reliable"). Interestingly, this has declined from 2005 when 90 percent felt this way. Of special note, the percentage of those who indicate that online medical information is "very reliable" has declined substantially from 37 percent in 2005 to the current 25 percent.

Cyberchondriacs are not only using the Internet to better educate themselves. Many are also using it to assist in their discussion with their physicians. However, these discussions are taking place in fewer numbers. By 52 to 48 percent, a slight majority of adults who have gone online to get health information say that they have discussed this information with their doctor at least once. This is down from 2005, when a 57 to 43 percent majority indicated this.

Furthermore, fewer than half (45 percent) of cyberchondriacs have searched for health information based on a discussion with their doctor. This is a decrease of seven percentage points from 2005's 52 percent. The poll was conducted by telephone within the United States between July 5 and 11, 2006 among 1,020 adults (aged 18 and over). For more information visit www.harris-interactive.com.

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fullmening.no), Denmark (www.danskemeninger.dk) and Finland (www. mielipide-tutkimus.com). In addition, Research Now has also built a bilingual panel in Belgium in both Flemish (www.joumening.be) and French (www.votreopinion.be).

Separately, the firm has added an automotive panel profile screener. The screener, sent to a selection of online consumer panel members, has been designed to be used across European markets (U.K., Germany, France, Italy and Spain). Panelist car ownership has been broken down across over 500 different models, covering all major brands. The screener also covers topics such as intent to purchase a car, type of car purchased (new, second-hand, company car, etc.), methods of finance and insurance provider. For more information visit www.research-now.co.uk.

Study of shoppers uses qual/quant approach

Information firm Planet Insights is now offering the Shopper Mindset Study, which draws from shop-along research and provides both quantitative and qualitative data on shopping trip behavior. The study uses online survey resources and software analysis tools from BIGresearch. The study is fielded to over 5,000 shoppers on a semi-annual basis, resulting in hundreds of respondents for many types of shopping trips, enabling marketers to keep tabs on changing consumer mindsets. For more information visit www.planetinsights.com.

New panel products from Vision Critical

Vancouver research firm Vision Critical has released a panel management system, Panel+. It includes DataONE, which captures and stores every data point, allowing researchers to simultaneously analyze across multiple surveys including segmented sampling using any data point from any survey. Also, the DataPLAY function contains full functionality for multidimensional crosstabulations, with the ability to alter variables and question transformation. For more information visit www.visioncritical.com.

Remark Classic OMR gets an update

Scanning software maker Remark Products, Malvern, Pa., has updated its Remark Classic OMR, a Windows software package for scanning pre-printed forms using traditional OMR scanners offered through manufacturers such as NCS Pearson. Enhancements include Self Score support for NCS scanners, Questionmark export, a new grade and print mode, and a variety of new reports with options for question weighting, benchmarks, learning objectives, crosstabulations and greater customization. Please see www.gravic.com.

Test, screen new product concepts online

Cincinnati-based Marketing Research Services Inc. has added two online concept testing functions, ConScan and ConSelect, to its PRISM system for product development. ConScan online concept screening is designed to help clients at the concept ideation phase of product development where consumer needs have been identified and initial concept solutions are being evaluated. ConScan screens those ideas to help clients determine which initial concepts offer the most potential and should be developed into full concepts and moved forward into the concept testing phase.

Once potentially successful concepts have been identified, ConSelect online concept testing helps clients determine which of those are the strongest in terms of purchase intent, likes and dislikes and expected purchase frequency.

ConScan uses a primarily sequential monadic screening technique so consumers can eval-

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uate up to five potential concepts in one survey. At this stage, concepts are brief, usually three to four sentences with a price and a visual. ConSelect uses a primarily monadic testing technique, where consumers evaluate only one concept at a time. Concepts are more detailed and the focus shifts from screening to fine-tuning and optimizing the concept message and positioning using the ConSelect solution. For more information visit www.prism.mrsi.com/conselect.html.

2006 Estimates and 2011 Projections available

The Demographic Data Center is offering its 2006 Estimates and 2011 Projections product, which provides basic demographic variables for the U.S. population and for five-year projections of population trends. The 2006 Estimates fill in the gap since the 2000 Census and the 2011 Projections build on these data, projecting where population trends are heading in the next five years.

Variables include total population, population change, total households, race, age, gender, household income, owners vs. renters, and more. The data from Estimates and Projections is available in five geographies: states, counties, tracts, block groups and zip codes. Users can also run a radius around a latitude/longitude point. For more information visit www.usa-demographics.com/estimates/estimates.htm.

Changes to Synovate Oncology Monitor

Synovate Healthcare announced changes to the European arm of its Global Tandem Oncology Monitor. From August, the European Tandem Oncology Monitor now reports patient demographics and market shares on a monthly basis. In addition, it now offers immediate access to monthly data online using mrTables, part of the SPSS Dimensions software. The Monitor also incorporates EphMRA's Anatomical Therapeutic Classification system to offer further flexibility in segmentation analysis within the oncology market. For more information visit www.synovate.com/healthcare.

GIS book, GeoCollector series, and data projections from ESRI

Redlands, Calif.-based ESRI has released its 2006 demographic data estimates and 2011 projections and made them available as downloadable reports and maps from Business Analyst Online, ESRI's on-demand reporting and mapping service. The 2006/2011 data is available in more than 50 reports and maps such as the demographic and income profile, market profile, and age by race profile. For more information visit www.esri.com/bao.

Separately, ESRI Press has released *A to Z GIS: An Illustrated Dictionary of Geographic Information Systems*, a guide to the language of geographic information system (GIS) technology. The book (288 pages, $24.95) is available at online retailers and at bookstores or can be purchased at www.esri.com/esripress.

ESRI has also released the GeoCollector series, a field data collection solution that merges ESRI's mobile GIS software with global positioning system (GPS) technology from Trimble, a provider of positioning solutions. GeoCollector includes a handheld computer with integrated GPS receiver from the current Trimble GeoExplorer series and ESRI's ArcPad. To meet the full range of field data collection requirements, the device is available in three accuracy options: subfoot, submeter, and one- to three-meter. The GeoCollector series also includes Trimble's GPScorrect for ArcPad, which collects and manages the GPS data necessary for differential correction during data collection. In addition, Trimble's GPS Analyst for ArcGIS Desktop is available as an add-on to enable the direct transfer of data from GeoCollector and to perform differential correction inside ArcGIS Desktop. For more information visit www.esri.com/geocollector.

TNS expands travelers panel

London research firm TNS has launched its Travellers' Panel, an online sub-panel of its 6thdimension panel which provides access to 500,000 international respondents across six European countries (the U.K., France, Germany, the Netherlands, Italy and Spain). Sub-samples of respondents from a range of different market segments can be identified, including long-haul vacationers and business travelers. These can be matched against preferred vacation destination, type of vacation and accommodation, allowing bespoke sampling of specific holiday travelers to inform business and communications strategies. For more information visit www.tns-global.com.

PVR renovates test kitchen facilities

PVR Research, Duluth, Ga., has completed a renovation of its research center, including a remodel of its commercial test kitchen facilities. The kitchen renovation consists of a new, large walk-in freezer and refrigerator unit, more counter space and new equipment that can be disconnected and reconfigured to accommodate individual research needs. PVR's remodeled test kitchen includes a new commercial range, eight standard ovens and a commercial Vulcan convection oven, 18 microwaves, a 75 lb. fryer, a commercial griddle and an ice machine. For more information visit www.pvr-research.com.

Briefly

Newark, N.J.-based InterClipper is now offering DVD Clipper, which lets users mark focus group clips on facility DVDs for free. Users can decide later which clips they want to export and pay to unlock just the DVDs that have the clips they need. For more information visit www.interclipper.com.

New York research firm Advanced Focus has opened Advanced Focus - The Facility on Park Avenue in Manhattan. It has four suites, each offering surround sound. Two LCD TVs for video playback are mounted in all four respondent rooms. Each viewing room has individual A/C control, staged seating, wireless Internet and an attached client lounge equipped with closed-circuit television, a computer, printer and Internet access. For more information visit www.advancedfocus.com.

New York research firm Ipsos Insight has unveiled its Innotrack tool, which measures how well a new product has performed in the market - domestic or global - versus expectations. Innotrack is designed to shed light on why products perform the way they do by identifying consumer motivations and deterrents to trial and repeat. For more information visit www.ipsosinsight.com/products/innotrack.aspx.

Diagnostics Plus, a State College, Pa., research firm, announced an expanded service to the college and university market. The service, called Resource Priorities and Performance Research, engages multiple stakeholder groups at a college or university (administrative leadership, academic deans and directors, staff, students and others) to help them make facilities management decisions. For more information visit www.diagnosticsplus.com.

Synovate Healthcare has launched online physician panels in China, Korea, Taiwan, Philippines, Hong Kong, Singapore, Japan, Malaysia and India. For more information visit www.synovate.com.

TNS Ireland has expanded its FMCG consumer-tracking Worldpanel service to 1,350 households in the Republic of Ireland and intends to increase it to 3,000 by August 2008. For more information visit www.tns-global.com.

Schlesinger Associates has opened a new qualitative research facility in Phoenix. Located on East Camelback Road, across for the Biltmore Fashion Park, the facility has four focus group suites equipped with high-definition monitors, wireless Internet, digital recording and marking, videostreaming and videoconferencing. For more information visit www.schlesingerassociates.com.

San Francisco research firm Zoomerang has launched its Customer Satisfaction Resource Center at www.customersatisfactionresource.com. Visitors to the free site can access survey templates, best practices in creating effective customer satisfaction surveys, and research and analysis of customer satisfaction.

New York-based Gazelle Global Research Services LLC has launched a new business unit, Gazelle Globalization Group (g3), to provide language solutions to firms with ongoing multilingual and international communication concerns. Areas of focus include market research, financial, medical, health care, pharmaceutical, legal, travel and tourism, information technology and government sectors. For more information visit www.g3translate.com.

G & S Research, Carmel, Ind., has established G & S Discovery, a new division focusing on the life science research supply marketplace. For more information visit www.gs-research.com.

New York research firm Medefield reported in late June that its online physician respondent community had grown by 25 percent to over 400,000 physicians worldwide in the past 12 months. For more information visit www.medefield.com.

Simmons Online, Fort Lauderdale, Fla., is now linking custom online research with its National Consumer Study (NCS), allowing clients to access proprietary data along with more than 50,000 additional data variables within the NCS. For more information visit www.smrb.com.

Netherlands-based research firm the SKIM Group has supported the initiative to launch a Web site devoted to conjoint analysis. The site, www.conjointpage.com, contains links to commercial and academic sources and specialist agencies, articles and papers, research associations, conferences, conjoint software, books, universities, a forum and other conjoint-related sites.

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operations. Changes include a move from a regional structure to smaller strategic units. The new strategic unit structure has the following leadership: northern Europe will be led by Peter Huijboom, who also remains CEO, global client relationships; southern Europe will be led by Ged Parton, who remains head of the brand and communications practice; United Kingdom will be led by Peter Chopra, who remains CFO; Asia will be led by Tim Balbirnie, currently CEO, Asia Pacific; Australia/New Zealand will be led by Brent Stewart, currently head of Synovate's Australian operation; central/eastern Europe, and the Middle East will be led by Nicos Rossides, currently CEO, central/eastern Europe, the Middle East and Africa; Africa will be led by Albert McLean, currently COO Africa; North America will be led by CEO Robert Skolnick; Latin America will be led by EVP Ignacio Galceran.

The Response Center, Fort Washington, Pa., has changed its name to TRC.

Greenfield Online, Inc., Wilton, Conn., has begun separating its Ciao Internet survey solutions and comparison shopping business segments from an operational and legal perspective. "This decision is consistent with the steps already taken in the first quarter of this year to separate these business segments from a financial reporting perspective," said Al Angrisani, president and CEO of Greenfield Online, in a company statement.

The company also announced that Ciao GmbH's two managing directors, Max Cartellieri and Gunnar Piening, resigned their positions with the company. They are succeeded by Nicolas Metzke, who has been appointed managing director of Ciao. Metzke will head Greenfield Online's European subsidiary Ciao GmbH through the separation process and the Internet survey solution business going forward.

Vancouver research firm **Vision Critical** has attained Double-Gold Certified status in the Microsoft Partner Program.

Denmark software firm **iMotions – Emotion Technology** has exercised an option to bring in two additional angels to its investor group, adding Andy Miller and Joergen Thorball.

Rochester, N.Y.-based **Harris Interactive** announced a series of actions in its U.K. operations, including the closing of two facilities, a reorganization of several operating and support groups and a small reduction in workforce.

The company closed a facility in Macclesfield and another in Stockport, consolidating those operations into its Hazel Grove location. It plans to sell its Stockport facility no later than June 7, 2007. To increase operating efficiency and create better alignment with its customer base, the company has reorganized its U.K. marketing, health care and human resource teams. Marketing will now be centered at European headquarters in Brentford, where the company will hire new directors of marketing and public relations. The U.K.-based health care division will now be part of the U.K. business and report to George Terhanian, president of Harris Interactive Europe. The U.K. human resources team will now jointly report to Terhanian and Dennis Bhame, corporate executive vice president of human resources. In connection with the facilities consolidation discussed above, the company also anticipated a reduction in its U.K. staff by 10-15 employees by June 30, 2006, which required estimated cash severance charges of between $250,000 and $300,000.

Acquisitions/transactions

Wayne, Pa., employment services firm **Kenexa** has acquired Minneapolis-based **Gantz Wiley Research**. Gantz Wiley Research created WorkTrends, a database of employee survey results with comparisons on topics including leadership, employee engagement and customer orientation. Financial details of the transaction were not disclosed.

Chicago-based **Information Resources Inc.** (IRI) has acquired the assets of **Secant Inc.**, a beverage alcohol consultancy and information provider. Secant principals Elena Amboyan and Anne Carlson have been named senior vice presidents and will join the beer, wine and spirits vertical practice at IRI.

Paris-based **Ipsos** has signed a letter of intent to acquire a minority stake in the capital of the **Tambor Group**, a research company working in the Czech and Slovak markets. The agreement will allow Ipsos to increase its shareholding to 66 percent in 2009.

Omaha, Neb., information firm **infoUSA Inc.** has entered into a definitive merger agreement under which it will acquire **Opinion Research Corporation** for $12 per share in cash. The total transaction value including the assumption of debt is approximately $134.3 million. The transaction, which is expected to close in the fourth quarter of 2006, is subject to customary closing conditions and the approval of Opinion Research Corporation shareholders. Opinion Research Corporation will remain headquartered in Princeton, N.J., and will continue to operate independently as part of infoUSA.

Dean Moorehouse has purchased **Strategic Research Associates** (SRA), Spokane, Wash., from **KXLY Broadcast Group**. Moorehouse has been with SRA since its inception as sales and marketing manager and has assumed the title of president. Strategic Research Associates was formed in 1996 as an independent subsidiary of KXLY Broadcast Group. One of SRA's founding members, Steven Dean, has agreed to partner with SRA, and will continue to lead research initiatives on behalf of the company.

Seattle research firm **Global Market Insite, Inc.** (GMI), has closed $35 million in a Series C venture capital financing round led by **Technology Crossover Ventures** (TCV). Series C co-investors and existing VC investors FTVentures and Voyager Capital are electing to increase their respective stock holdings in GMI in this financing. In addition, GMI announced that Greg Stanger, venture partner at TCV and former chief financial officer of Expedia, will join the company's board of directors.

London-based **TNS** has acquired **FutureView**, a tool which measures and classifies consumers according to how "future influential" they are. An update of the early adoption model, FutureView segmentation questions the extent to which consumers demonstrate elements of new consumerism such as social responsibility and self-expression. FutureView was developed in Australia and New Zealand by Malcolm Law who, as part of the acquisition, has joined TNS' segmentation and positioning area where he will support the introduction of the methodology.

Subject to approval from Indian authorities, Germany's **GfK Group** will acquire 51 percent of India's **Mode Group**, which was established in 1981 and has operated in its present form since 2004. The company, which will be called GfK Mode, has branches in 13 Indian cities.

Also subject to approval, GfK will acquire a 66 percent stake in **Custom Research China**. GfK is planning to increase this to 100 percent in stages by 2014. In future, the company will operate under the name GfK Custom Research Beijing.

Braintree, Mass., research firm **Perseus Development Corporation** and **WebSurveyor**, Herndon, Va., have merged. The two entities will be combined under a newly formed holding company funded by Austin Ventures. Dean Wiltse was named chairman and CEO of the combined entity.

Alliances/strategic partnerships

Chicago-based **Research International** has opened an office in Egypt, appointing Egypt-based **Logic Market Research** as an associate firm.

Canada-based **Techneos Systems** Inc. and Spanish firm **Trevenque Sistemas** have renewed their agreement to provide Techneos Systems' Entryware survey software to the Spanish market.

Vancouver-based research firm **Vision Critical** is partnering with **Feldman Research Lab**, Teaneck, N.J., to allow clients to use each firm's respective services.

Germany-based firms **DAP Systems** and the **GfK Group**, both providers of software to analyze media use in the TV market, have formed an alliance. In 2007, the pc#tv production and evaluation software used by GfK in TV audience research is to be replaced by the new proprietary GfK system Evogenius. The specification for the system was developed in cooperation with AGF and the GfK companies specializing in media research. The main priority is to design a software system which can be used in both the national and international arenas. Like GfK, DAP Systems is a contractual partner of AGF and develops evaluation and planning programs on its behalf for the German TV market. It provides solutions that can be used in sub-areas of the Evogenius system. DAP Systems will develop new applications for the corresponding areas in Evogenius in consultation with GfK.

Association/organization news

Dominique Hanssens, Jim Nyce and Joe Plummer have joined the **Boardroom Project**, a body of marketing scientists working to establish marketing measurement standards for continuous improvement in financial performance. Hanssens is the Bud Knapp Professor of Marketing at the UCLA Anderson Graduate School of Management and the 2005–07 executive director of the Marketing Science Institute. Nyce is senior vice president, global consumer insights and strategy at Kraft Foods Inc. Plummer is the chief research officer at the Advertising Research Foundation.

Awards/rankings

Research International was cited by Vodafone for the research company's role in helping Vodafone win first prize in the U.K.-based

Marketing Society's awards for a concept testing system that is designed to deliver better return on investment from the new-product development process. The Marketing Capability prize was awarded to Vodafone for the differentiation potential system (DPS), a global model for testing the business potential of new concepts and for successfully integrating the end-to-end system throughout Vodafone internationally. "Together with Research International and Oxford Strategic Marketing, we created and implemented a rigorous new system for identifying which new products deserve investment and which don't. The impact is a higher return on our new product development investment and a faster, better product development cycle," said Gillian George, senior insights manager, Vodafone, in a press release.

A poll in Afghanistan conducted by New York-based **Charney Research** has won ABC News the inaugural annual award for excellent journalism using polls. The award-winning, two-part series, "ABC News polls in Iraq and Afghanistan," aired in December 2005. The award, from the University of Iowa School of Journalism and Mass Communication and the Gallup Organization, recognizes the importance of the news media's use of polls in understanding public opinion and shaping discourse on social and political issues. ABC's broadcast of the Charney survey "shows how using accurate polls, as a basis of understanding public opinion, can contribute to vital stories that truly make a difference in our world," said Jim Clifton, chairman and CEO of the Gallup Organization, in a press release. Prior to the ABC poll, Charney had conducted the first national political survey in post-Taliban Afghanistan for the Asia Foundation. Both surveys are available at www.charneyresearch.com.

New accounts/projects

Researcher **TNS** has renewed its partnership with CNN and *Time* magazine. Under the terms of the agreement, TNS will deliver insights based on consumer opinion research spanning 12 Asia-Pacific countries.

Wal-Mart Stores Inc. has signed a new agreement designating **ACNielsen** as its sole provider of consumer panel services. This new agreement complements the Spectra segmentation and targeting applications that ACNielsen already provides to Wal-Mart. Wal-Mart will use the ACNielsen's Homescan consumer panel to understand shopper segments and use Spectra's BehaviorScape store-by-store targeting applications.

Redlands, Calif.-based **ESRI**'s ArcPad mobile GIS platform will be a component of the Field Data Collection Automation (FDCA) project for the 2010 U.S. Census. Harris Corporation, Melbourne, Fla., has been selected by the U.S. Census Bureau as the system integrator and prime contractor for a $600 million, five-year program to develop and implement an automated system for field data collection. The FDCA program will support census field enumerators who will follow up and collect survey data from households that did not return their census forms. The field enumerator will be equipped with GPS-enabled mobile devices, which will include ESRI's ArcPad software.

Dallas-based Service Broadcasting Corporation has signed a multi-year commitment to use radio audience estimates based on New York-based **Arbitron Inc**.'s Portable People Meter when Arbitron deploys the audience measurement service in Dallas. Additional firms - Bonneville International Corporation; Emmis Communications Corporation; Greater Media Inc. and Lincoln Financial Media - have entered into multi-year agreements for Portable People Meter radio ratings when the new audience ratings technology is deployed in the 50 markets encompassed in Arbitron's previously announced PPM rollout plan.

Norway research software company **FIRM** has renewed an agreement to provide its Confirmit survey, panel and report platform to U.K. research firm **Qubiq-Online**. Separately, FIRM has signed a similar agreement with resort company Intrawest, which will license the software as an on-demand solution.

The U.K.'s National Foundation for Educational Research (NFER) has selected London-based **Pulse Train**'s Bellview Scan and Bellview Web software tools to carry out a number of research projects across the education community. Both products will be used to help the NFER gather research data from teachers, pupils and other groups involved in the education system.

Research software firm **NEBU** has added **Johnston, Zabor, McManus Inc.**, a Durham, N.C., research firm, to its client list.

New companies/new divisions/relocations/expansions

Lightspeed Research, Basking Ridge, N.J., has opened an office in Tokyo and named Chris Duston vice president of business development in Japan.

Gongos Research has expanded to a 30,000-square-foot building in Auburn Hills, Mich., outfitting 15,000 square feet for immediate use while anticipating further expansion. The new offices house a technology-based infrastructure and a focus group facility. The firm changed its name from Gongos and Associates Inc. to Gongos Research in conjunction with the move.

Millward Brown has opened an office in Geneva, Switzerland. The office will be headed by Sana Carlton, previously global account coordinator based in Millward Brown's Madrid office and Martine Rebours, TGI director for France. Rebours will take on this additional responsibility while continuing in her current role.

Simmons Market Research has moved its headquarters to the Florida Atlantic University Research and Development Park. The new address is 1501 SW FAU Research Park Blvd., Suite 100, Deerfield Beach, Fla., 33441.

St. Louis-based **Maritz Research** has opened a new survey center in Saskatoon, Saskatchewan. The center is 12,000 square feet and has 150 stations.

BIGresearch LLC has moved to 450 West Wilson Bridge Rd., Suite 370, Worthington, Ohio, 43085.

London-based **Research Now** has opened an office in Melbourne office and tapped Brad Wilson to head it.

Gary Mullet Associates Inc. has moved to 302 River Birch Court, Canton, Ga., 30114-5740. Phone 770-479-0540.

New York research firm **TNS** has opened a client service office in Bellevue, Wash., at 11100 Northeast 8th Street, Suite 770, Bellevue, Wash., 98004. Phone 425-462-6153. TNS has also named Tom Buehrer vice president and senior account director to work with the team in the Bellevue office.

Synovate has opened an office in Hangzhou, China, teaming with former supplier firm Chun Qiu. The Chun Qiu staff will now work for Synovate and the business will become a branch of Synovate China.

Research firm **MRT Services Inc**. has moved to 3905 Harrison Rd., Suite 500, Loganville, Ga., 30052. Phone 770-554-6775. Fax 770-554-5660.

Company earnings reports

In terms of sales and total income, the second quarter of 2006 was successful for Germany-based **GfK Group**. In the first six months sales were up 54.6 percent year-on-year to EUR 534.4 million. Adjusted operating income rose 76.3 percent to EUR 63.8 million.

Knowledge Networks, Menlo Park, Calif., reported 27 percent year-over-year revenue growth for the second quarter of 2006, with revenue of $9.2 million dollars for the period. The company continued to deliver positive net income.

Norway-based **FIRM** reported a second-quarter revenue increase of 31 percent compared to the corresponding quarter of 2005. FIRM achieved revenue of $4.6 million in the second quarter of 2006 compared to $3.5 million in the corresponding quarter of 2005. The cash flow from operations was $1.3 million in the second quarter of 2006.

SPSS Inc., Chicago, announced results for the quarter and six months ended June 30, 2006. Second quarter revenues were a record $63.5 million, an increase of 9 percent from $58.1 million in the second quarter of 2005. New license revenues were $29.3 million, up 20 percent from $24.4 million in the 2005 second quarter. For the six months ended June 30, 2006, revenues totaled $125.7 million, an increase of 9 percent from $115.5 million for the same period in 2005. New license revenues for the first six months of 2006 were $59.2 million, up 17 percent from $50.4 million for the six months ended June 30, 2005.

Diluted earnings per share (EPS) in the 2006 second quarter were $0.12, compared to $0.21 for the same period last year. This decrease was primarily due to a $2.2 million charge related to share-based compensation reflecting the January 1, 2006 adoption of Statement of Financial Accounting Standards (SFAS) 123R.

For the six months ended June 30, 2006, EPS was $0.35, compared with $0.34 in the same period last year. The 2006 period includes a charge of $3.1 million related to share-based compensation reflecting the January 1, 2006 adoption of SFAS 123R. In addition, the effective income tax rate increased to 38 percent in the first six months of 2006 from 34 percent in the same period last year. An increased number of diluted shares further lowered earnings in the 2006 period. As of June 30, 2006, cash was $113.3 million up from $84.4 million as of December 31, 2005 and $54.2 million on June 30, 2005.

Gongos Research, Auburn Hills, Mich., reported 39 percent growth in first-half 2006 revenue relative to last year, moving from $3.8 million in the first half of last year to $5.3 million this year, and projected 31 percent growth in total revenue relative to last year.

For the second quarter 2006, **Arbitron Inc.**, New York, reported revenue of $74.2 million, an increase of 6.2 percent over revenue of $69.8 million during the second quarter of 2005. Planned spending on the Portable People Meter and Project Apollo initiatives and the required expensing of share-based compensation contributed to increased costs and expenses for the second quarter of 21.4 percent, from $55.4 million in 2005 to $67.3 million in 2006. Earnings before interest and income tax expense (EBIT) for the quarter were $11.9 million, a decrease of 35.8 percent over EBIT of $18.6 million during the comparable period last year. Net income for the second quarter decreased by 52.2 percent from $15.4 million in 2005 to $7.4 million in 2006. Net income per share for the second quarter 2006 was $0.24 (diluted) compared with $0.48 (diluted) for the second quarter 2005.

For the six months ended June 30, 2006, revenue was $159.3 million, an increase of 6.9 percent over the same period last year. EBIT was $41.0 million, compared to $51.3 million in 2005. Net income for the six months was $25.5 million or $0.83 per share (diluted), compared with $35.2 million or $1.11 per share (diluted) during the comparable period last year.

At **National Research Corporation**, Lincoln, Neb., revenues for the second quarter ended June 30, 2006 were $10.7 million compared with revenues of $7.2 million for the same period in 2005. Net income for the quarter was $1.3 million, or $0.19 per basic and diluted share, compared with net income of $925,000, or $0.13 per basic and diluted share, in the prior-year period. Earnings per share for the quarter were negatively impacted $0.02 as a result of the effect of Statement of Financial Accounting Standards (SFAS) No. 123R adopted in the first quarter and would have been $0.21 per share without that effect.

Revenues for the first half of 2006 were $20.1 million compared with revenues of $14.0 million for the same period in 2005. Net income for the six months ended June 30, 2006 was $2.5 million, or $0.37 per basic and diluted share, compared with $1.6 million, or $0.23 per basic and diluted share, in the prior-year period. Earnings per share for the six months ended June 30, 2006 were negatively impacted $.04 as a result of the effect of the company's adoption of SFAS No. 123R and would have been $0.41 per share without that effect.

Second-quarter revenues at Princeton, N.J.-based **Opinion Research Corporation** increased to $50 million and income from continuing operations was $777,000 or $0.14 per diluted common share. Consolidated revenues were $50 million in the second quarter of 2006, increasing from $49.0 million in the second quarter of 2005. Social research revenues were $36.6 million, increasing from $36.2 million in the second quarter of 2005. Market research revenues totaled $13.4 million, increasing from $12.8 million in the second quarter of last year. Income from continuing operations was $777,000, as compared to $1.6 million in the second quarter of 2005.

Contributing to the decline in income from continuing operations is expense of $163,000 reflecting the adoption of the Financial Accounting Standards Board Statement 123(R) on share-based payments, interest expense of $700,000 on subordinated debt issued in July 2005, and a higher effective tax rate which reduced income from continuing operations by $124,000.

New York-based **NetRatings**' revenues for the second quarter of 2006 were $19.9 million, a 17 percent increase over revenues of $17.1 million in the second quarter of 2005, and a 9 percent increase over revenues of $18.3 million in the first quarter of 2006. Net income for the second quarter of 2006 was $931,000, or $0.03 per share, on approximately 34.8 million shares. This compares with a net loss of ($2.3 million), or ($0.06) per share, in the second quarter of 2005, on approximately 36 million shares. On an EBITDA basis, the company earned $2.2 million or $0.06 per share during the second quarter of 2006. This compares with an EBITDA loss in the second quarter of 2005 of ($577,000), or ($0.02) per share.

At **Greenfield Online**, Wilton, Conn., financial results for its second quarter ended June 30, 2006 showed total net revenue was $24.5 million compared with $26.3 million for the prior year period. Total gross profit was $18.9 million or 77.3 percent of revenues for the second quarter of 2006, as compared with $19.1 million or 72.8 percent of revenues in the prior year period. Operating income was $3.7 million for the second quarter of 2006 or 15.1 percent of revenue, as compared to $4.5 million or 17.2 percent of revenue for the prior year period.

Net income for the second quarter of 2006 was $2.3 million, as compared with $19.1 million for the prior year period. Net income in the second quarter of 2005 benefited from a $15.7 million domestic deferred tax asset valuation allowance release related to expected future utilization of tax benefits, primarily relating to net operating loss carryforwards.

Cash flow from operations was $5.1 million for the second quarter of 2006 as compared to $6.7 million for the prior year period.

For the second quarter of 2006, adjusted EBITDA, excluding restructuring charges, was $7.3 million or 29.8 percent of revenues, as compared to $7.6 million or 28.7 percent of revenue for the prior year period.

On a global basis, Internet survey solutions revenue for the second quarter of 2006 was 42 percent full-service and 58 percent sample only. This compares to 47 percent and 53 percent, respectively, for the first quarter of 2006.

In the second quarter of 2006, the firm completed 2,896 projects for 477 clients. This compares to 2,536 projects for 461 clients in the first quarter.

IMS Health, Fairfield, Conn., announced second-quarter 2006 revenue of $486.2 million, up 12 percent on a reported and constant-dollar basis, compared with revenue of $433.3 million for the second quarter of 2005. Second-quarter 2006 diluted earnings per share on an SEC-reported basis was $0.30, compared with $0.41 in the prior year. Excluding the expensing of equity-based compensation, on an adjusted basis, earnings per share was $0.39, a 15 percent increase, compared with $0.34 per share in the same period last year. Including the expensing of equity-based compensation, adjusted earnings per share for the second quarter was $0.34. Net income on an SEC-reported basis was $62.7 million, compared with $93.2 million in the year-earlier quarter. On an adjusted basis, excluding the expensing of equity-based compensation, net income rose 2 percent to $79.3 million for the 2006 second quarter, compared with net income of $77.8 million in the prior year. Including the expensing of equity-based compensation, adjusted net income for the second quarter of 2006 was $70.9 million, down 9 percent.

Operating income in the second quarter of 2006 was $106.3 million on an SEC-reported basis, up 3 percent, compared with $103.3 million in the year-earlier period. On an adjusted basis, excluding the expensing of equity-based compensation, second-quarter operating income was $124.4 million, a 12 percent increase (11 percent constant dollar), compared with $110.7 million in the year-earlier period. Including the expensing of equity-based compensation, adjusted operating income in the 2006 second quarter was $112.3 million, up 1 percent reported and flat constant dollar, over the prior year.

Adjusted results for the 2006 second quarter exclude certain pre-tax income items totaling $33.7 million, primarily due to a payment received from VNU, N.V. related to the termination of the proposed merger that was announced in November 2005, as well as certain net tax provisions of approximately $41.9 million, including a tax charge of $21.4 million related to a reorganization of several of the company's subsidiaries. Second-quarter 2005 results on an adjusted basis exclude a one-time tax benefit of $24.3 million related to repatriating $647 million of previously undistributed foreign earnings under the American Jobs Creation Act.

For the first half of 2006, revenues were $932.4 million, up 10 percent (12 percent constant dollar), compared with revenue of $844.3 million for the first half of 2005. Diluted earnings per share on an SEC-reported basis for the first half of 2006 was $0.86, compared with $0.54 in the prior year. Excluding the expensing of equity-based compensation, on an adjusted basis, earnings per share in the 2006 first half was $0.72, a 14 percent increase, compared with $0.63 per share in the same period last year. Including the expensing of equity-based compensation, adjusted earnings per share for the first six months of this year was $0.65, up 3 percent. Net income on an SEC-reported basis for the first half of 2006 was $180.8 million, compared with $123.5 million in the year-earlier period. On an adjusted basis, excluding the expensing of equity-based compensation, net income for the 2006 first half rose 4 percent to $151.4 million, compared with net income of $145.9 million in the same period last year. Including the expensing of equity-based compensation, adjusted net income for the first six months of 2006 was $136.1 million, down 7 percent.

For the first six months of 2006, operating income was $203.1 million on an SEC-reported basis, a 1 percent increase, compared with $200.2 million in the year-earlier period. On an adjusted basis, excluding the expensing of equity-based compensation, operating income for the 2006 first half was $230.8 million, an 11 percent increase (12 percent constant dollar), compared with $207.6 million in the year-earlier period. Including the expensing of equity-based compensation, adjusted operating income in the 2006 first six months was $209.1 million, up 1 percent on a reported basis and 2 percent on a constant-dollar basis over the prior year.

Adjusted results for the 2006 first half exclude certain pre-tax income items totaling $35.2 million primarily from the terminated VNU merger, as well as certain net tax benefits of $9.4 million. First-half 2005 results on an adjusted basis exclude a one-time tax charge of $42.8 million related to repatriating $647 million of previously undistributed foreign earnings under the American Jobs Creation Act.

In the first half of 2006, Paris-based **Ipsos** generated revenues of EUR 407.7 million, an increase of 26.7 percent. At 8.6 percent, organic growth was stronger than the 7.8 percent reported in the first half of 2005. Changes in the scope of consolidation had a positive impact of 14.1 percent, thanks mainly to the integration of MORI in the U.K. and Ireland, Understanding Unlimited in the U.S. and Camelford Graham in Canada.

Names of Note

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promoted to vice president with responsibility for R&D and marketing sciences. **Martin Slack** has joined Millward Brown Australia to head its Melbourne office. Millward Brown announced the following promotions at its other offices: **Alison Brown** to vice president, Los Angeles; **Cathy Hartman** and **Ken Clark** to vice president, Fairfield, Conn.

Cambridge, Mass., research firm *Abt Associates* announced a number of personnel changes, adding **David Ferreira** as chief human resources officer, **Deborah Klein Walker** and **Carlos Carrazana** as vice president, **Neal S. Mantick** as director of registries, and promoting **David Loeser** to senior vice president. **Stanley J. Lukowski**, chairman and CEO of Eastern Bank Corporation, has joined the Abt Associates board of directors. **Howard Rolston** has joined the firm as a part-time principal associate. Research scientist **Burt S. Barnow**, associate director for research at the Johns Hopkins University Institute for Policy Studies, has become an affiliate scholar with Abt Associates.

Scott Hendricks has joined the New Jersey office of Milwaukee research firm *Market Probe* as vice president.

Cooper Research Inc., Cincinnati, has named **Joseph Hodgson, Jr.**, vice president, strategic research.

N.Y. researcher *Ziment* has named **Basya Gale** worldwide chief qualitative officer.

Andrew A. Salzman has joined *Information Resources Inc.*, Chicago, as executive vice president and global chief marketing officer.

IMS Health, Fairfield, Conn., announced the resignation of **Nancy E. Cooper**, senior vice president and chief financial officer.

Research firm *TNS* has named **Wander Meijer** regional director for Latin America. TNS has also named **Murray Campbell** head of the company's polling and social government research sector across the Asia Pacific-Latin America-Middle East and Africa (ALM) region. **Graeme Jacombs** has joined the regional healthcare team as healthcare research director. TNS has also named **Tom Buehrer** vice president and senior account director, to work with the team in the firm's new Bellevue, Wash., office.

TVG Marketing Research & Consulting, Dresher, Pa., has added **Don Marshall** as vice president and chief methodologist.

Marshall **Raghavan**

Carolyn Phillips has joined the *Maritz Pharmaceutical Research Group*, St. Louis, as a research manager. **George Ellis** has joined the group as senior research manager. **Lili Pasha** has been named the group's director of research services and **Madhunika Raghavan** has been named its director of research and operations.

Port Washington, N.Y., research firm the *NPD Group* has promoted **Art Spar** to president of the company's apparel tracking services.

Edward van Dam has joined the Calgary Team of Canada-based *Leger Marketing* as director of research.

Bonnie Bergey joined *Innovation Focus Inc.*, a Lancaster, Pa., research firm, as an associate director. In addition, the firm named Lindsay Brown associate, **Laura B. Miller** associate director, and **Greg Pratt** senior associate.

Cincinnati-based *Marketing Research Services Inc.* has named **Jennifer Petsche** project director and **Nathaniel Hausrath** script writer.

Genina A. Gravlin has been named program manager for *Marketing Leverage Inc.*, a Glastonbury, Conn., research and consulting firm.

Stamford, Conn., research firm *InsightExpress* has named **Michael Tsavaris** vice president, chief financial officer. **Melissa Ludack** has been named senior marketing science analyst and **Adam Zambuto** has been named market research analyst. **Junny Cho** has joined the company as a project manager within the company's AdInsights Group, and **Emily Morgan** and **Natalia Tomasio** have joined as customer service representative. The firm also named **Alan Distassio** market research manager. **Meredith Klein-Hertzel** has been promoted to project manager.

London-based *Insight Research Group* has named **David Burke** regional business director for mainland Europe.

Arbitron Inc., New York, has appointed **Linda Dupree** executive vice president, Portable People Meter, new product development.

New York research firm *Dynamic Logic* has named **Jean Robinson** president.

Norwalk, Conn.-based research firm *Ipsos ASI* announced the reorganization of the company into two regional divisions - Ipsos ASI North America West and Ipsos ASI North America East. **Katie Koval** has been promoted to senior vice president of the U.S. western region for the copy testing business. **Fred Marshall** has been promoted to senior vice president of the U.S. eastern region for the copy testing business. **Mike Weisberger** has been appointed senior vice president of the U.S. eastern region for the tracking and equity business. **Steve Wynn** has been promoted to senior vice president in the Cincinnati office.

Bill Etter, senior research executive at *Research International*, Chicago, has received the David K. Hardin Award for "Loyalty Leverage," the best paper published in *Marketing Research* in 2005. The editorial review board of the American Marketing Association's *Marketing Research* magazine selects a winner each year based on innovativeness of the research, its usefulness and applicability for other researchers and the potential societal or economic benefits or implications of the research. The paper addressed the difference between turning a neutral customer into a loyal customer versus resolving problems of an at-risk customer. Separately, Research International added **Kale Lepak** and **Nyssa**

Lepak Packard

Packard as part of its graduate development program.

Parsippany, N.J.-based *Ipsos Loyalty* has named **Curt Carlson** senior vice president of Ipsos Loyalty in the U.S.

Rockhopper Research, Whippany, N.J., has appointed **Karl Buchholz** director of data analytics.

London-based *Research Now* has named **Marc Smaluhn** managing director for central Europe. He is based in Frankfurt and will set up a second office for Research Now in Germany.

Los Angeles research firm *OTX* has named **David Shanker** chief operating officer and promoted **Bruce Friend** to president of media and entertainment insights.

Cincinnati-based marketing firm *dunnhumbyUSA* has named **Jacob King** associate director of custom insights.

MAXimum Research Inc., Cherry Hill, N.J., has promoted **Chris Monaco** to account executive.

Portland, Ore., research firm *Doxus* has named **Edward B. (Beau) Martin** senior marketing scientist.

Frances Nuzzi has joined *Target Research Group Inc.*, Nanuet, N.Y., as senior vice president.

M/A/R/C Research, Irving, Texas has

named **Laurie Harrington** research director.

LaTonya McCummings has joined the staff of *AllPoints Research Inc.*, Winston Salem, N.C., as marketing research analyst.

San Mateo, Calif., research firm *WWMR Inc.*, has named **Sharon Grehan** managing consultant, consulting services.

Polaris Marketing Research, Atlanta, has added **George Van Eron** as an operations process and quality manager and named **Debra S. Semans** senior vice president. In addition, **Michelle Auda** and **Latasha T. Poindexter** have joined the firm as marketing research project managers.

Semans **Dooley**

Bellomy Research Inc., Winston-Salem, N.C., has named **Courtney Dooley** senior research manager.

Redlands, Calif.-based *ESRI* has named **Guenther Pichler** business development manager for the Europe, Middle East and Africa group.

Two members of *On-Line Communications*, a Bartlesville, Okla., research firm, were honored at the Marketing Research Association's (MRA) 2006 Annual Conference and Research Industry Forum. **Nancy Hayslett**, the firm's director of market research sales, was the recipient of the MRA's Distinguished Service Award. The award recognizes the extensive and distinguished service of an individual to both MRA and the opinion and marketing research profession. The MRA cited Hayslett's 25 years of service as a volunteer, founding member of the MRA's Southwest Chapter and national president 1989-1990. **Bobbie Kirkland**, director of Internet operations, was the recipient of the MRA's Southwest Chapter's Chapter Service Award. The award acknowledged her accomplishments as a chapter volunteer for the last 10 years, serving as chapter president, membership chair and newsletter editor.

New York research firm *Medefield* has named **Jim Anderson** executive director, client development.

Simon Kooyman has been named CEO of *Knowledge Networks*, Menlo Park, Calif. **Murlidhar Rao** has joined the firm's Needham, Mass., office as vice president, client services. **Arabella Greystoke** has joined the New York City office as vice president, business development. **Tom Greco** has been promoted to vice president, managing director of the Chicago office and the KN/PDI office in Cincinnati. **Norman Nie** has accepted the position of non-executive chairman of the Knowledge Networks board of directors. He succeeds Fredric W. Harman, general partner of Oak Investment Partners, who remains a member of the Knowledge Networks board.

Eleanor Yates, director of the Philadelphia operation of Birmingham, Mich.-based *Consumer Pulse*, has also been appointed to the corporate staff as an operations manager. **Kimberly Hofmeister**, director of the firm's Baltimore operation, has been appointed to the corporate staff as an operations manager.

The Meadowlands Consumer Center, Secaucus, N.J., has named **Kevin Rente** research consultant.

Barbara Katz has been named president of *HealthFocus International*, a St. Petersburg, Fla., research company.

New York research firm *Advanced Focus* has promoted **Bruce Bond** to recruitment supervisor and named **Elise Dunn** executive vice president, human resources and operations.

Cincinnati research firm *Burke, Inc.* has added several new employees, naming **Olesya Govorun** analyst, **Van Do** research associate, **Cheryl Levy** associate qualitative specialist, **Lindsay Hossbach** associate project manager, **Susan Simpson** and **Thomas Mills** vice president in client services, **Irene Fedyushina** senior account executive in client services, **Rachel Agin** account manager, and **Kim Lyons** project management assistant.
Separately, **Joe Ottaviani**, senior vice president and general manager at Burke, Inc., has been recognized for excellence in service by the Marketing Research Association. Each year, MRA recognizes one member who has brought excellence in service to the association during the past year and who has worked on national workgroups, committees and task forces.

G & S Research, Carmel, Ind., has named **Laura Aspling** project manager, **Karin Gray** analytics manager, **Debbie Rolfsen** accounting, and **Kellie Woods** lead data technician. **Mark Walker** has joined G & S Research as a vice president to lead the development of the firm's new G & S Discovery division focusing on the life science research supply marketplace.

Vince Barabba, chairman and co-founder of *Market Insight Corporation*, Palo Alto, Calif., has been named to the Market Research Council Hall of Fame. The Market Research Council Hall of Fame was established in 1977 to recognize outstanding members of the market research profession. Barabba was inducted for his contributions in the field of market research and his leadership in major public and private enterprises that has led to significant societal and business contributions.

2006

Customer Satisfaction

Directory >>>

This directory references those firms that identified themselves as specializing in customer satisfaction services in the 2006-2007 Researcher SourceBook. These firms may also be found on our Web site (www.quirks.com) by either searching the online Customer Satisfaction Directory or the Researcher SourceBook.

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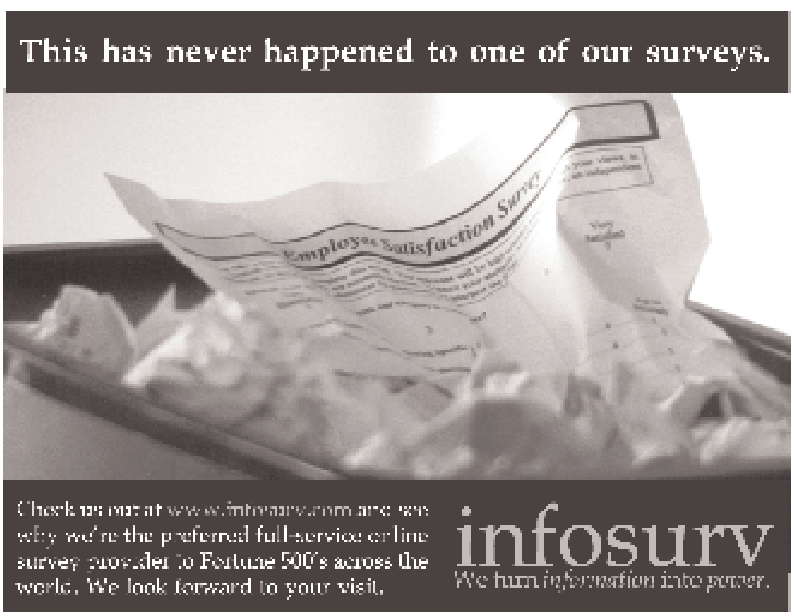

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trade talk

By Joseph Rydholm
Quirk's editor

Changing diapers, thinking about ethnographic research

This past July, my wife and I journeyed to China to adopt an 11-month-old baby girl. It was an exhilarating, exhausting trip - which is just how I would describe the weeks and months since our return.

Prior to getting our new addition and becoming parents for the first time, we spent a few days as tourists, briefly taking in the sights of Beijing before flying to Chongqing to begin a four-day cruise up the Yangtze to see the Three Gorges Dam. Next came Wuhan, where we spent a week in a hotel after receiving our daughter, and then flew to Guangzhou, site of a U.S. consulate, to spend another several days finalizing the adoption before flying back home.

As prepared as we were for all that was about to happen (my wife is the queen of preparedness and had not only organized the entire adoption process but also had made sure we brought along every possible bit of baby care paraphernalia with us), I don't think we foresaw the difficulties of learning to be parents while living out of suitcases in a series of hotel rooms - especially when your new child isn't happy to be your new child.

On the day that we, along with 38 other adoptive families, crowded into a hotel conference room in Wuhan to meet our babies for the first time, our daughter grieved the loudest and the longest. Some kids handle being separated from their foster family or orphanage caregivers well, some don't. Our Jia in the latter category. She had been with a foster family, which is a good thing as it usually means she received more one-on-one care and attention. But it also means that strong bonds are formed, making the pain and grieving of losing the foster parents more acute.

As often happens in adoption, our daughter instantly bonded with just one of the parents, which happened to be me. She was, in adoption lingo, a barnacle baby. For the first several days, I could not put her down without causing a storm of tears and wailing. My wife assisted as much as she could with the childcare duties but Jia's protestations meant I was thrust into the role of primary caregiver.

Things have improved markedly since those first difficult weeks. Beautiful Jia seems happy to be with both of us, has a great sense of humor (it is possible for a 14-month-old to have a sense of humor, isn't it?) and is already regularly outsmarting her parents.

Team of ethnographers

Throughout these early months of fatherhood, I have had many troublesome encounters with baby-related products, and, being the research nerd that I am, I have repeatedly wished the makers of these products had a team of ethnographers following me and observing my difficulties. (Thankfully, in most cases we've been able to find other, more satisfactory products after fumbling with the ones detailed below.)

My first beef is with the makers of baby clothes. My early impression is that they all must think that parents dress toddlers when they are asleep. How else to explain the presence of the tiny, difficult-to-grasp buttons - many of which seem completely superfluous?

I do accept some of the blame. As a rookie parent, you need to think ahead when you dress your kid in the morning. For example, when we dressed Jia at 4:30 a.m. on the day we were to begin the 16-hour journey back home (a five-hour flight from

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