

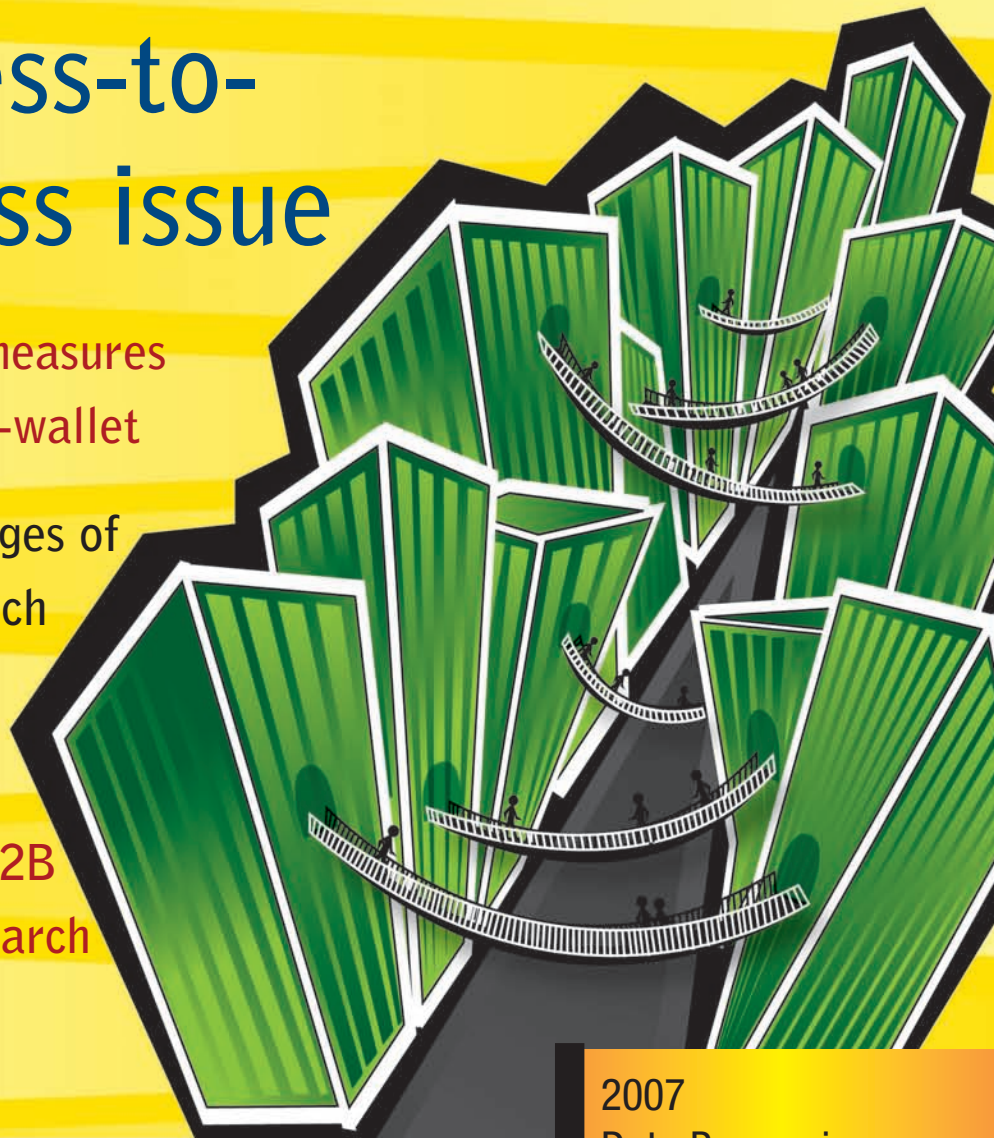
QUIRK'S

Marketing Research Review

MARCH 2007

Business-to-business issue

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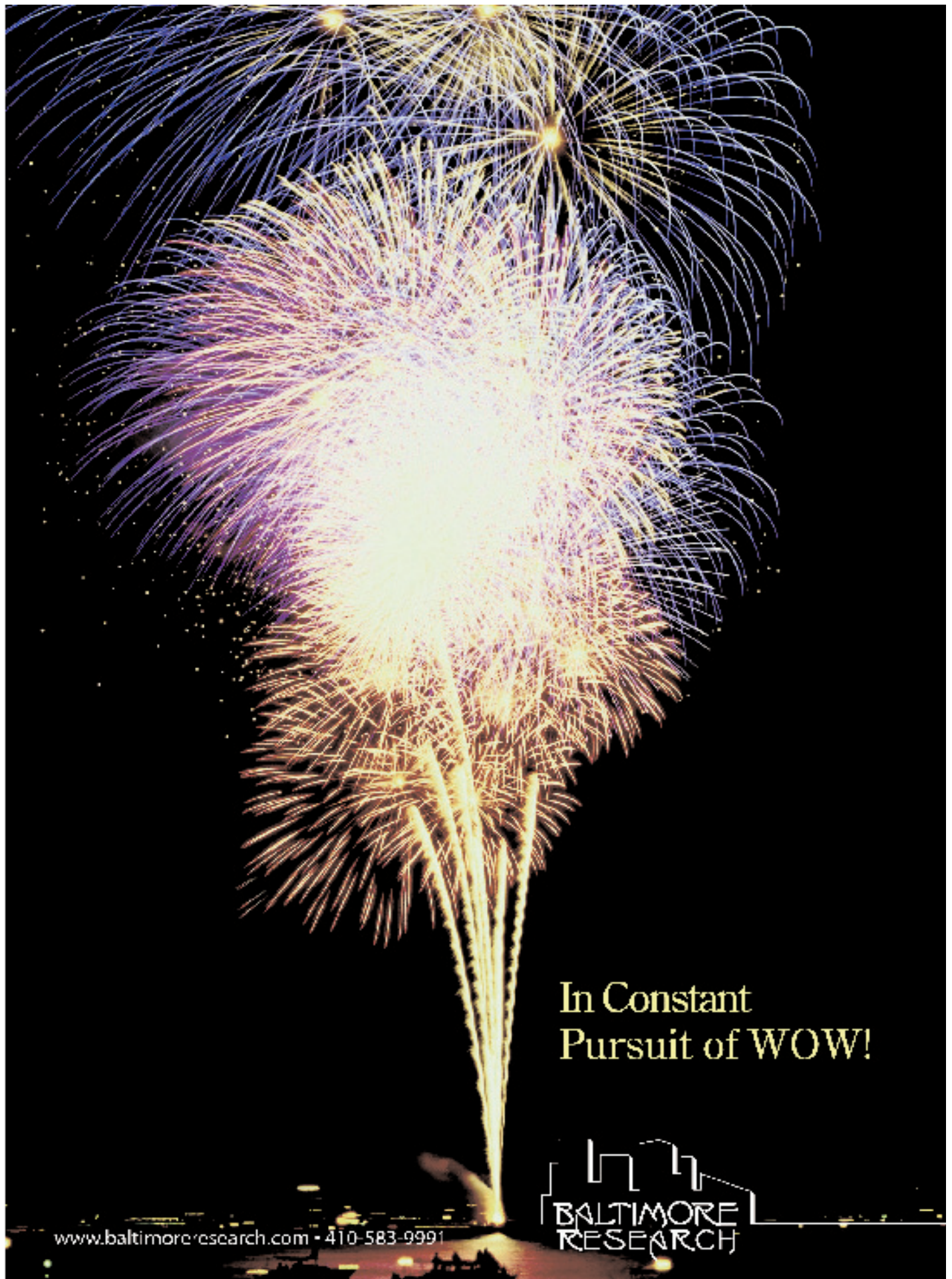


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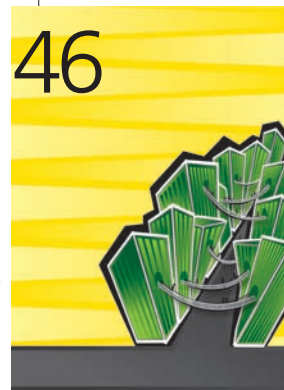
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Timing appears to be everything with survey invitations

Although respondents to online surveys can choose when to complete surveys, the time at which the invitation is sent can have a major impact on the number of responses, according to findings from London-based Lightspeed Research.

The firm sent out invitations to an online survey to 7,440 of its panelists in Great Britain at different times during the week. Overall the results showed that invitations sent on a Monday afternoon achieved the best response rates, at up to 39 percent. Surveys sent at 5:30 p.m. on Friday afternoon resulted in relatively low response rates of 28 percent for women and 29 percent for men.

Additionally the research showed that external events could have a dramatic impact on response rates for online surveys. A major soccer game on Wednesday night had an impact on response rates, in particular amongst male respondents. Only 11 percent of male invitees from the Wednesday 5:30 p.m. invitation group responded to the survey, compared to 31 percent of women.

The research also showed that the majority of responders are likely to respond in the first 24 hours, with only around a third responding after this period. In other words, if the response rate is quite low within the first 24 hours it is unlikely to recover in the following days. Invitations sent on Monday at 5:30 p.m. achieved a response rate of 26 percent within the first 24 hours and ended with a total response rate of 38 percent after six days. On the other hand, an invitation sent on Wednesday at 5:30 p.m. achieved only a 14 percent response rate after 24 hours and a total rate of 22 percent after six days.

When looking at the type of people who responded fastest, the study also found that the older members tended to respond quicker than younger people. Those in the 18-24-year-old range had a 9 percent response rate between 0 and 12 hours after the invitation was sent, rising to 14 percent for 48 hours-plus. The opposite trend was seen for the 55-65-year-olds, with a response rate of 29 percent in the first 12 hours, dropping to 22 percent for 48 hours-plus.

"Respondents are more likely to take part in a survey shortly after having received the invitation than keep it in their inbox and come back to it later," said David Day, CEO of Lightspeed Research. "This does suggest that if the time for fieldwork is short, then deploying studies later in the week should be avoided, and this does have implications for certain industries that favor weekend completion. It also suggests that it is important to understand if the 'missing' responders have a different set of characteristics to those available to respond beyond the simple demographic differences outlined in this work which can be managed using quota controls."

Success has many fathers...

Readers of this space know of our fascination with marketing efforts gone awry. The new year brought another doozy. PROMO Xtra's Betsy Spethmann reported that Babies "R" Us would give away \$120,000 in savings bonds and cash to make peace with consumers after a disqualification in its First Baby of the Year contest earned the wrath of Chinese-Americans and immigration advocates.

The contest promised a \$40,000 prize package to the first baby born on New Year's Day in a hospital that was registered for the contest. Three babies were born at midnight and Babies "R" Us randomly drew for a winner. The retailer disqualified the first name drawn because the parents, both Chinese nationals, were not American citizens.

Babies "R" Us said it awarded the \$40,000 prize package to the second baby whose name was drawn, then decided to give the same package to the two other families after the disqualification sparked a debate on immigration.

Babies "R" Us duplicated the grand-prize package as a gift in a goodwill gesture. The contest disqualification stands, and the rules were not breached, the company said.

Babies "R" Us funded the two additional packages, which include a \$25,000 savings bond for the child, a \$10,000 education grant for the hospital, and \$5,000 in Babies "R" Us gift cards for the delivering obstetrician.

In a statement, the company said, "We love all babies. Our sweepstakes was intended to welcome the first baby of 2007 and prepare for its future. We deeply

regret that this sweepstakes became a point of controversy. As a result, we have decided to award all three babies in the grand prize pool a \$25,000 savings bond."

The contest, like most contests and sweepstakes run in the U.S., was open only to U.S. citizens. For contests that involve children, it is standard practice for contest administrators to verify the parents, not just the child, before declaring a winner. In this case, critics argued that the Chinese-American baby is a U.S. citizen since it was born in the U.S., according to news reports. But sweepstakes professionals recognize that the parents, who make legal decisions on their baby's behalf, must also meet eligibility requirements.

Babies "R" Us garnered more than 1,000 entries directly from expectant moms. This was the second year that the contest has been run.

"Babies "R" Us Makes Amends over New Year's Contest," PROMO Xtra, January 9, 2007

New home = new TV

New homes inspire a desire for new televisions, according to the study Households on the Move, which found that recently-moved households lead non-moving households in all categories of recent TV purchases, from traditional tube TVs to flat-panel plasmas.

The study from Dallas research firm Parks Associates reports an estimated 23 million U.S. households move every 18 months. In that same timeframe, 20 percent of these households have purchased a traditional tube TV, 16 percent have purchased a flat-panel LCD TV, 7 percent have purchased an HD traditional tube TV, and 8 percent have purchased a flat-panel plasma. Among households that have not moved in the past 18 months, only 14 percent have recently purchased a traditional tube TV, 13 percent have purchased a flat-panel LCD TV, 5 percent have purchased an HD traditional tube TV, and 5 percent have purchased a flat-panel plasma.

The study attributes several factors to this trend, including the inconvenience of moving bulky electronics devices, concern over damage during the move, and a desire to outfit additional rooms in a new home.

"In some cases, over one-third of all the households buying these new products have recently moved," said John Barrett, director of research at Parks Associates. "That's not a segment you want to disregard. Consumer electronics companies should target households on the move through discounts and promotions."



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The NFL still rules

Professional football continues to be the most popular sport among U.S. adults who follow more than one sport, although its popularity has dropped slightly from 2005's high. In 2006, 29 percent of adults who follow more than one sport said pro football was their favorite, down four percentage points from 2005's 33 percent. Baseball remained



unchanged at 14 percent, with college football coming neck-in-neck again (13 percent, unchanged from 2005) and auto racing, which was down two points at 9 percent. Professional basketball has increased by three percentage points, with 7 percent of adults who follow more than one sport saying it is their favorite.

These are the results of a nationwide survey by Harris Interactive, Rochester, N.Y., conducted online between December 12 and 18, 2006 among 2,309 U.S. adults, of whom 1,219 follow more than one sport.

Since Harris Interactive began asking this question in 1985, professional

football has always been on top and its popularity is now five points higher (from 24 percent to 29 percent). Compared to 1985's results, baseball has dropped nine percentage points (from 23 percent to 14 percent), horse racing and men's tennis have both dropped three percentage points and college football and auto racing have each increased by three percentage points.

The survey also finds some sizable differences between different segments of the population. Pro football is most popular among those who live in the East (39 percent), those with household incomes of \$35,000 to under \$45,000 (39 percent), among Generation X (those ages 30 to 41) (36 percent) and African-Americans (35 percent). Those who earn less than \$15,000 (20 percent) are least likely to call football their favorite sport.

Baseball is most popular among liberals (20 percent) and those who live in the East (19 percent). African-Americans are least likely to say baseball is their favorite sport (7 percent).

College football is particularly popular among those with postgraduate degrees (23 percent). Just six percent of those who live in the East cite college football as their favorite sport.

Auto racing (which includes NASCAR) is most popular among those with household incomes of \$25,000 to just under \$35,000 (19 percent) and those with a high-school education or less (15 percent), while it fares worst among those with a post graduate degree (1 percent) and liberals (4 percent). For more information visit www.harrisinteractive.com.

Mobile surveys get a thumbs-up from younger respondents

A study by Lightspeed Research on

the acceptance and effectiveness of mobile surveys found that 16-to-24-year-olds in the U.K. have the highest response rate and the fastest completion time of surveys conducted via mobile phone. However, technology issues, cost for participants and the novelty factor of mobile market research needs to be addressed properly in order to gain an understanding of this methodology.

Compared to online surveys where the younger age groups tend to be less active, surveys conducted on the mobile phone seem to benefit from handsets being one of the must-have accessories that most under-25-year-olds carry with them at all times. This age group achieved a response rate of 39 percent, while those over 55 had a response rate of only 17 percent. These older respondents also showed a high incompleteness rate of 47 percent compared to only 14 percent for 16-24-year-olds, indicating the older age groups were less comfortable using this method of survey completion.

Lightspeed Research evaluated the feasibility of mobile market research by running trial surveys in the U.K. The research was carried out in three stages. In stage one, members of the Lightspeed online panel were asked if they were willing to take part in stage two - a mobile survey. Thirty-nine percent of them agreed to take part in the second stage and have questionnaires sent to their phones, showing a healthy enthusiasm for this method. Finally, in stage three participants were sent a further online survey to ask them about their experience and opinion on using their mobile to answer questions.

By definition mobile surveys can be answered at home, on the bus, at a friend's house or in a bar. Combined with the brevity of the survey (in this case six questions) the expected

continued on page 68

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names of note

Nadim Sadek has joined *Research International* as its worldwide commercial and strategy director.

Cincinnati-based *Marketing Research Services Inc.* has added four new employees, naming **Jay Bigler** senior research analyst; **Kate Muehlfeld** and **Jan Arthur** senior project director; and **ZoEtta Bullucks** coder.

Australia-based research process outsourcing firm *Pulse Group* has named **Sheikh Zain** head of marketing.



Zain

Ng

Jeremy Ng has joined as business development manager. **Alim Yassir**



Yahya

Howe

Yahya has been named multimedia designer. **Tan Ling Howe** has been hired to expand the firm's CATI services. And **Jacklyn Tan** has been



Tan

promoted to senior client services executive.

Omaha, Neb.-based research firm the *MSR Group* has named **Laura O'Gara** vice president of marketing.



O'Gara

Clark

Burke, Inc., Cincinnati, has named **Judithe Andre** account manager. She will work from Burke's Chapel Hill, N.C., office. **Steve Clark** has been promoted to senior vice president, data acquisition and processing.

Survey Sampling International, Fairfield, Conn., has appointed **Jim Follett** CEO.

Gary Dilts has joined *J.D. Power and Associates*, Westlake Village, Calif., as senior vice president - U.S. automotive.

Dow Jones Indexes, New York, has named **Kathleen Delaney** senior director of marketing.

Flake-Wilkerson Market Insights, Little Rock, Ark., has named **John Stebbins** vice president.

Jim Longo has joined Saskatoon-based *Itracks* as vice president, client development.

Diagnostics Plus, a State College, Pa., research firm, has named **James Fong** president.

Synovate has named **Frank Gabbert** vice president of its qualitative division in North America. He will be based in the firm's Detroit office. Separately, *Synovate Healthcare* has named **Kelly**

Price head of the Asia Pacific Tandem Oncology Monitor in China, Korea and Australia.

Stamford, Conn., research firm *InsightExpress* has named **Kevin Hill** vice president, group director, advertising media.

Baltimore-based research firm *B-More Informed* has named **Kelly Carter** executive director of client relations and **Sandy Tomak** director of research and development.

Online Survey Solution, a division of M/A/R/C Research, Irving, Texas, has added **Meg Ryan** as director of client development.

Richard Catrone has joined Menlo Park, Calif.-based research firm *Knowledge Networks* as senior vice president, operations. He will be based in the New York and Cranford, N.J., offices.

Julie Holbein has joined *MarketVision Research*, Cincinnati, as vice president with a focus on client management and development.

Kimberly Travis has been promoted to senior research associate at *Gateway Commercial*, a St. Louis real estate services firm.

Cincinnati radio marketing and research firm *Critical Mass Media* has named **Liz Pokora-Sadowsky** executive vice president of marketing.

Freedom Interactive, Irvine, Calif., has named **Linda Fisk** vice president of marketing. Research will be among her new responsibilities.


The NPD Group, Port Washington, N.Y., has named **Frank Racioppi** vice president of market-level point-of-sale (POS). **Sheri McKee** has joined NPD as product director of market-level POS. **Emil Martinez** has been named vice president of business and product development.

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product and service update

SPSS updates Clementine

SPSS Inc., Chicago, released an update of its enterprise data mining software Clementine. Version 11.0 is designed to enable organizations to enhance productivity in customer relationship management, marketing and risk analysis and provide analysis for fraud detection.

New algorithms provide support for credit scoring (discriminant function analysis), complex pricing models (generalized linear models), CRM and response modeling (logistic regression), forecasting (time series) and rule-based models that incorporate users' business knowledge.

The time to develop and deploy models has been reduced due to the development of more robust transformation capabilities, more automated data cleansing and the use of optimal binning to enable more predictive power. Developing and selecting the best model is made simple by building multiple models simultaneously with the Binary Classifier.

Users are now able to edit and distribute presentation-quality images, providing more efficient management

reporting and more effective communication through a new graphics engine and integration with the reporting and graphics of the SPSS statistical products.

Users can now leverage their IT investments by using the parallelism in hardware and software (such as multi-processor or multicore systems) as well as data mining algorithms provided as part of the database systems by IBM, Microsoft and Oracle. The use of SSL encryption and stream password protection of files heightens the security of sensitive data. For more information visit www.spss.com/clementine/whats_new.htm.

2006 TIGER/line files with census geographies

The Demographic Data Center is now offering StreetCD 2006, a three-DVD or multiple-CD set which includes economic census boundaries and updated voting districts. With StreetCD 2006, users can export any layers from the 2006 TIGER Line Files for importing of geographic data into ArcView and MapInfo. With the Windows interface you export

boundaries quickly and can also view and map the layers yourself with the product's built-in map viewer.

In addition to economic census boundaries and voting districts, the StreetCD 2006 provides classifications and data for all roads, railroads, hydrography and landmarks as well as legal, statistical and administrative boundaries for census, transportation, education and more. Purchasers also get address range and zip+4 data for building their own geocoders. For more information visit www.demographic-information.com/streetcd/streetcd.htm.

New health care panel from Greenfield

Greenfield Online Inc., Wilton, Conn., has launched Curizon, the first in a planned series of new specialty panel Web site communities. Curizon is a community for Greenfield Online's panel of physicians and other health care profession members who participate in health care research. Curizon provides members with enhanced profile capabilities, a custom portal page and improved capabilities for tracking their personal honorarium and paid incentives online.

The Curizon panel is designed for physicians and specialists, nurses, nurse practitioners, pharmacists, managed care executives, hospital executives, optometrists, veterinarians and other health care practitioners. It was developed based on Greenfield Online's recently launched panel management system, which incorporates capabilities for creating specialty panelist Web site communities. For more information visit www.greenfield.com.

Monitor CPG new-product trends with GNPD

Chicago researchers Mintel and Information Resources Inc. have teamed to launch GNPD IRIS, which



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research industry news

News notes

Kantar announced that all of its Japanese businesses - Research International, Millward Brown, ICM/Added Value and Lightspeed Research - are being merged into a single business, Japan Kantar Research. Kantar said the decision was taken with the Japanese market in mind and it has no plans to replicate this

approach beyond Japan.

In a move that emphasizes its best-known brand name, **VNU** announced it has changed its name to the **Nielsen Company**. Immediate steps to launch the new branding for the company included the introduction of a new corporate Web site (www.nielsen.com) and graphic identity. The new

identity will be rolled out progressively by all Nielsen businesses during 2007.

Vancouver-based research firm **Vision Critical** announced in January that it had launched its 150th online panel.

Acquisitions/transactions

Phoenix Marketing International, a Rhinebeck, N.Y., marketing services firm, has acquired **JZM Inc.** (Johnston, Zabor, McManus), a full-service research firm based in Durham, N.C.

South Africa-based Adcorp Holdings Limited has sold **Research Surveys** to a consortium led by researcher **TNS**, Kapela Investment Holdings Ltd., and the senior management of Research Surveys. TNS Research Surveys is headed by newly appointed CEO Margarita Putter.

Milwaukee researcher **Market Probe Inc.** has acquired Belgium-based research firm **Ask**. Ask will continue to operate with its existing staff in its current location. Terms were not disclosed.

Alliances/strategic partnerships

Marketing Systems Group/GENESYS, Fort Washington, Pa., and **Luth Research**, San Diego, have collaborated to enhance and expand the use of the SurveySavvy Online Panel, which was developed by Luth Research in 2000. GENESYS will add full-scale Internet panel operations to its existing line of targeted samples. Luth Research will add GENESYS' sampling capabilities to its offerings. In addition, the firms

Calendar of Events March-May

CfMC will hold its users' conference on at the Stanford Court Hotel in San Francisco on March 15-16. It will be preceded by advanced training sessions on March 13-14. For more information visit www.cfmc.com.

IIR will hold a conference on marketing on March 19-21 at the Venetian hotel in Las Vegas. For more information visit www.iirusa.com.

The American Marketing Association will hold a conference on applied research methods on March 19-22 at the Renaissance Chicago Hotel. For more information visit www.marketingpower.com.

IIR will hold a conference on new product development for services on March 21-23 at the Rancho Bernardo Inn, San Diego. For more information visit www.iirusa.com.

Britain's Market Research Society will hold its annual conference on March 21-23 at the Hilton Brighton Metropole, Brighton, England. For more information visit www.mrs.org.uk.

IIR will hold a conference on youth marketing on March 25-28 at the Huntington Beach Resort and Spa, Huntington Beach, Calif. For more information visit www.iirusa.com.

IIR will hold a conference on achieving customer service excellence on March 26-28 at the Disney Grand Californian Hotel, Anaheim, Calif. For more information visit www.iirusa.com.

The Northern California Pacific Northwest, Southern California and Southwest Chapters of the Marketing Research Association will hold their annual Las Vegas conference on March 28-30. For more information visit www.mra-net.org.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on April 16-18 at the New York Marriott Marquis. For more information visit www.thearf.org.

IIR will hold its FUSE brand identity and package design conference on April 16-18 at Pier 60, New York. For more information visit www.iirusa.com.

ESOMAR will hold a conference on consumer insight on May 7-9 in Milan. For more information visit www.esomar.org.

ESOMAR will hold a conference on luxury brands on May 9-11 in Milan. For more information visit www.esomar.org.

The Greater New York/Philadelphia Chapters of the Marketing Research Association will hold their annual joint conference on May 10-11 at the Park Hyatt Philadelphia at the Bellvue. For more information visit www.mra-net.org.

The Minnesota/Upper Midwest Chapter of the Marketing Research Association will hold a new-technology and vendor fair on May 17 in Minneapolis. For more information e-mail info@mmra.org.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail us at editorial@quirks.com.

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Sampling for qualitative researchers

Sampling is a subject that many qualitative researchers want to avoid. Nevertheless, even qualitative researchers, who often deal with small samples, should know the basic concepts about sample size and sampling methods. Sampling concepts affect the decision about how many focus groups or in-depth interviews to conduct, where to conduct them and how to recruit participants. It is useful for all researchers to understand the sampling process without having to do the math. This article will use a comparison to interior design to help you understand how correct sampling methodology affects research outcomes.

A common question in the beginning of a survey research project is, how large should the sample be? There are precise mathematical methods to answer this question but often budget considerations are equally important. A statistician may specify the sample size but the research project budget cannot accommodate that many. Are there good arguments for a budget increase? Will the research be useless

if the sample is too small?

Using the correct size sample increases the probability that your findings accurately reflect the target population. If you understand the purpose of correct sampling, you can make better decisions about the sample size to ensure that research outcomes will be dependable.

- The sample should be large enough so that you see important patterns. Suppose you are looking at fabric to recover a sofa, and you get a one-square-inch swatch. You may not see the pattern of large flowers in the fabric. If you get a three-foot-by-three-foot swatch, you will be able to view the pattern. Similarly, in market research, you need a sample that is large enough so that you are confident that it reflects the pattern of behavior or attitudes in the target population.

- The sample should be large enough so that you can see significant differences between segments. If you are looking at two pieces of fabric, each one-square-inch in size,

Editor's note: Bonnie Eisenfeld is a self-employed marketing research consultant based in Philadelphia. She can be reached at 215-567-1635 or at bwehrl@yahoo.com.

that are only slightly different in color, you may not see the difference, but you surely will see the difference between the two colors if you compare three-foot-by-three-foot swatches. Similarly, in a research sample, if you are comparing segments of the population, you need a sample size that is large so that you are confident you are seeing any significant differences between segments of the population.

- The method for obtaining the sample is just as important as the sample size. Suppose your fabric has a border that is different from the middle. You need to get a swatch that shows both sections and best represents the entire piece of material. If you looked at only the border swatch, you would miss the main pattern. Similarly, in a research sample, you need to avoid bias in sam-



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pling to ensure that each member of the target population has an equal chance of being drawn for the sample. By avoiding bias in the sample, you will be confident that your conclusions are based on the behavior or opinions of the entire target population and not skewed towards only part of it.

A common problem with sampling bias in qualitative research is called a convenience sample. This

situation occurs frequently when recruiters produce repeaters or their friends and not fresh participants. Recruiters can also produce a biased sample if they use a list that has a built-in bias that excludes certain people. And some less ethical recruiters will produce bias by accepting ineligible participants.

- The sample does not have to be proportional to the population.

When obtaining fabric swatches, you would not need to get larger swatches from the larger rolls of fabric and smaller swatches from the smaller rolls. Similarly, in research samples, it is often possible to draw sound conclusions using the same-size samples from a population of 1,000 as from a population of one million.

- Respondents are more difficult to obtain than fabric. The analogy between research samples and fabric swatches ultimately doesn't work because people do not always want to be in the sample, whereas fabric does not object. The main reason respondents participate in surveys is their interest in the topic. To ensure a high response rate, you can explain the purpose of the survey, the importance of their participation, and how the findings will be used. Incentives for participation will increase response rate; the higher the incentive, the better the response, in most cases.

The list from which the sample will be obtained needs to be large enough to account for non-participation. If you could be sure that 100 percent of those people you asked to participate would do so, you wouldn't need to start with such a large list.

- There is always some chance of sampling error, but in a correct-size sample, the chance of error is minimized. Sampling error means that the sample is slightly off the mark. Maybe you got a fabric swatch from the manufacturer on a bad day and it had flaws. Maybe it was cut from a flawed part of the roll. In a research project, using a larger size sample means a smaller sampling error, which is what you want to ensure precision in your findings.

- If you need advice on sample size for a research project, ask a statistician not a decorator. But don't hesitate to demand an explanation of terminology in plain English. | Q



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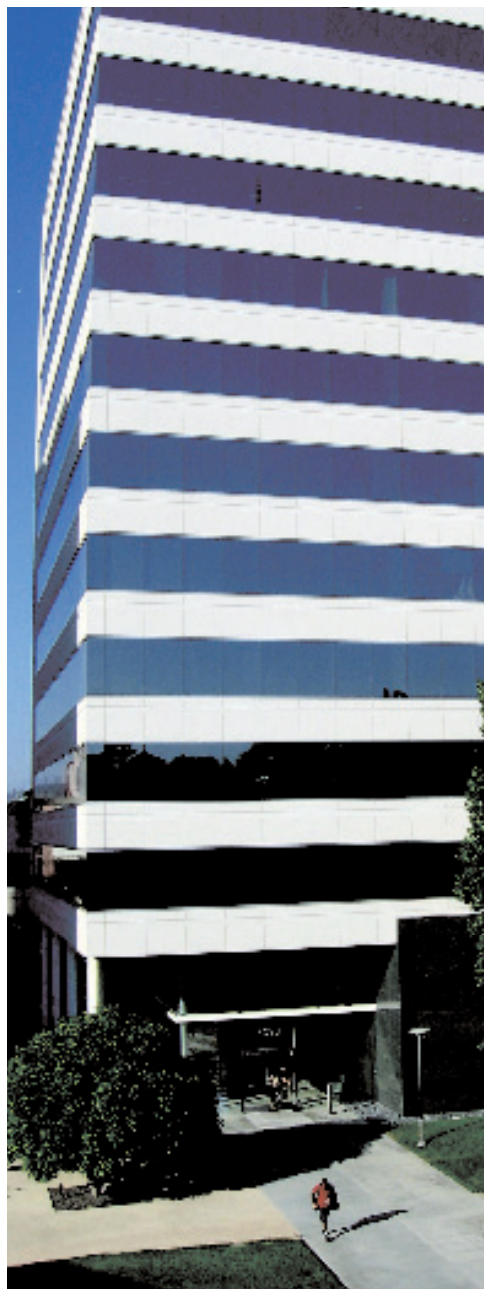
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Using discrete choice conjoint to validate stated-choice data

With the explosive growth and ease of conducting online surveys, one of the questions that keeps coming up is the reliability and validity of self-administered stated-choice data. This is compounded by the fact that oftentimes the easiest way to increase the response rate is to make the survey anonymous. This further raises questions about the truthfulness of a participant's responses.

Now more than ever, survey administrators are faced with the question of how to accurately model (analytically) a respondent's state of mind and thoughts. A survey is essentially an effort to numerically quantify a respondent's opinion. In this article, we will explore a modeling technique that uses conjoint analysis as an auxiliary validating tool for other stated-choice questions asked to the same respondent.

Let us assume we would like to model importance or purchase intent related to different attributes of a service or product. A

good example is airline ticketing. If the problem is to measure the importance users place in the different attributes (price, leg room, on-time departure, airline miles, etc.) we have a few options for the stated choice, or asking the user directly what they think. There are a number of different question formats you can use:

Editor's note: Vivek Bhaskaran is CEO and co-founder of QuestionPro, a Seattle research firm. He can be reached at vivek@questionpro.com.

attributes they think are important to them. Some would argue that a scale of 1-7 or even 1-9 is most effective. An example is shown in the table.

Please rate the following in terms of importance when purchasing a ticket from Seattle to NYC				
	Extremely Important	Very Important	Neutral	Not Important
Price				
Bonus Airline Miles				
Extra Leg Room				
Preferred Security/Screening				
On-Time Departure/Arrival				
Assigned Seating				

- Likert scale: Ask users to rate the importance of each of the attributes on a Likert scale. Users can choose a score of 1-5 (or 1-7 etc.) to numerically tell us what

- Top box scoring: Users can be asked to choose the top two or top three, etc., factors affecting their purchasing decision. In this model, you list all the attributes and force



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users to choose two and only two items.

Example:

Please choose the top two factors that affect your purchasing decision for a ticket from Seattle to NYC	
<input type="radio"/>	Bonus Airline Miles
<input type="radio"/>	Extra Leg Room
<input type="radio"/>	Preferred Security/Screening
<input type="radio"/>	On-Time Departure/Arrival
<input type="radio"/>	Assigned Seating

- Constant sum: Another way is to use a constant sum methodology, which forces people to rank their preferences by distributing a total of 100 points between all the different attributes.

Example:

Please distribute 100 points between the following attributes according to the influence each has on your decision to purchase	
	Points
Price	
Bonus Airline Miles	
Extra Leg Room	
Preferred Security/Screening	
On-Time Departure/Arrival	
Assigned Seating	
Total	100

So which should we use? Let us examine the differences between the

three proposed models. While the Likert scale is very popular, you'll note that it is the only one of the three that does not have a trade-off component. What do we mean by trade-off? Well, survey respondents can say all the attributes are "very important," which, while it may be true, does not really help the survey- or find out what is most important or least important, which is, after all, the whole point of asking the question.

Why is this ineffective? As consumers we like to think that everything is important, but the reality is some attributes (cost, brand, etc.) are definitely more important than others. Models that measure emotions like importance and purchase intent that do not have a trade-off component are much more vulnerable to random and inexplicable variations based on the sample population being surveyed. As a general rule, trade-off-based modeling resembles real-life scenarios more closely than other models.

At the risk of making top-box and constant sum models sound utopian, it should be pointed out that they have some shortcomings of their own.

Top-box scoring is typically best for consumer-oriented surveys given how easy they are to answer. All a respondent needs do is pick the one or two most-important attributes. This results in a low level of cognitive stress. Most people intuitively know immediately what's most important.

The problem with this approach is that the data captured is limited to high-level analysis only. For instance,

you don't know which of the chosen attributes is "most" important, or the degree to which one or more is more important than the others. And for many surveys, you run the risk of confirming what you already knew to be true (i.e., the price of a ticket was the most important factor in the purchase decision).

With the constant sum model, this problem is solved. In this case, you know exactly how important some attributes are relative to others, i.e., price is five times more important than on-time arrival.

But this high degree of analysis will come at a price for your respondents. Frankly, they have to think more and take more time - two aspects that have been shown to dampen response rates. They need to think and distribute 100 points over multiple attributes. They may get frustrated in filling out the survey. This model is generally more effective when the sample population is relatively sophisticated and has a high level of interest in filling out the survey.

Overall issues

Now that we've established a couple of models that can work in capturing data, let us look at some of the other overall issues with self-administered and stated-choice data.

One of the criticisms of self-administered and rated models is the belief that intentions often do not match actions. Let's take our airline ticketing example. The purchasing decision that users make in real life is a fundamentally different experience than taking an online survey that asks them to distribute 100 points between the different attributes that impact the purchasing decision. In real life, they need to get from A to B, and a number of factors play into their decision. While cost might be an issue in general, if they have to get to New York for a wedding, cost might not be as important as the schedule. In a survey, however, these external stimuli are absent. We are relying heavily on the cognitive ability of the user to translate their purchasing factors into their numeric



Pros and cons of various standalone question types

• Likert scale

Pros: Most common survey question format. Easy for users to understand and respond to.

Cons: Does not require users to trade off one attribute for another, enabling them to say "it's all most-important" and skewing results.

• Top-box scoring

Pros: Low level of cognitive stress. Users simply have to identify and choose the most important attributes. Good for consumer-oriented surveys.

Cons: Analytical data captured is limited to high-level analysis only. No detailed data of degree of importance for each attribute can be attained.

• Constant sum

Pros: Analytical data captured includes a component for the degree of affinity to a particular attribute. For example, inferences like "cost is twice as important as brand" can be made.

Cons: Higher degree of cognitive stress. Users need to think and distribute 100 points over multiple attributes. Users may get frustrated in filling out the survey. This model is generally more effective when the sample population is relatively sophisticated and has a high level of interest in filling out the survey.

equivalents.

Conjoint analysis models attempt to solve this problem by creating actual hypothetical products that users choose between. One of the artifacts that conjoint analysis can generate is the "relative importance" scores for all the attributes. The relative importance table essentially gives you on a 100-point scale (percentage) the importance of each of the attributes. This is very much similar to asking the user to distribute 100 points between the different attributes.

We now have two distinct and different models giving us the same data. The constant sum stated-choice data asks users directly and the conjoint analysis model generates the same data.

This multi-mode approach of evaluating the relative importance using conjoint and also through stated choice gives us a mechanism to validate/compare/contrast both the models. If the distribution of the stated-choice (constant sum) data is similar to the values obtained by conjoint modeling, then we can safely (with a high degree of reliability) say that the values actually represent the sample population that took the survey. However, if the values are distinctly different between the two models,

further investigation will be required to reconcile them.

In general, users tend to be more extreme when stating the importance

of the different attributes when asked directly (stated choice). The conjoint model allows the researcher to calibrate responses and scores based on two models that technically should arrive at a similar conclusion.

More confidence

We believe that this ability to calibrate and validate the responses using two different models allows researchers to have much more confidence in the data and make more reliable judgments.

I would like to specially thank Henry C. Eickelberg, staff vice president, human capital processes, at General Dynamics Corporation, who is largely responsible to bringing this validating model to our attention. While conjoint is traditionally and largely used in the market research space, Eickelberg has successfully used the same model in the human resource arena. His research initiatives have helped in determining optimal benefits packages and efficient benefits management across 18 business units within General Dynamics. | Q

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Measure it, then manage it

Based in Beaverton, Ore., Tektronix Inc. provides test, measurement and monitoring solutions to the communications, computer and semiconductor industries, enabling customers to design, build, deploy and manage next-generation global communications networks and advanced technologies. The company operates in 19 countries and is a market leader in four core product categories: oscilloscopes, logic analyzers, video test and network management and diagnostics.

A key part of the company's efforts to enhance shareholder value is its

Tektronix uses research to create key customer metrics and drive marketing and sales strategies

commitment to continuously improve its understanding of its customers. The goal is to anticipate customer needs and to serve them better. Thus, capturing customer insights is always top-of-mind at the company.

Tektronix currently conducts primary

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research among its top customers as a way to gain this insight. The company had a lot of anecdotal information regarding customers and secondary research on brand preference and awareness. However, to support its sales teams, the marketing organization needed to be able to make recommendations and decisions based on specific customer data, information that helps understand customers' supplier preferences and purchasing intentions.

Develop customer metrics

Co-author Etherington and his team reviewed their current data and realized that while many of the metrics they tracked were designed to make his group more efficient and effective, they were focused internally on marketing operations. The company decided it needed to conduct research to develop some customer metrics that would complement its well-developed internal metrics. The results of this research would be used to drive marketing and sales strategies aimed at its global customers.

Additionally, the company wanted to better understand its current and potential share-of-wallet (the percentage of the customer's budget allocated to Tektronix's types of products and services) among its customers and create a baseline net advocacy score (the percentage of

customers who are advocates of the company and its products minus the detractors) and benchmark this score against its competitors as a driver to continuous improvement.

Tektronix decided that an outside firm with experience and track record in this area would be needed for the work. The Tektronix team reviewed several companies - both those that provide research and those that provide tools for customer study and analysis. In each instance, Tektronix objectively evaluated each potential provider's level of expertise to enable final selection. In the end, Tektronix chose VisionEdge Marketing (VEM), Austin, Texas, as its partner in the study.

VisionEdge Marketing employed its QuickStart Intelligence Service to conduct a share-of-wallet and customer loyalty study. The company

also incorporated select metrics-related tools and techniques from its Metrics First Service to develop the customer metrics that were necessary to the study.

Personal approach

Since the questions were going to be in-depth and designed for probing it was decided that this project called for a personal approach. Given that the participants were geographically dispersed, a telephone interview methodology was chosen.

VisionEdge Marketing and Tektronix developed an interview guide designed specifically for the Tektronix customer base. The discussion guide consisted of 25 questions, covering test and measurement equipment purchase process and preferences; supplier strengths and weaknesses; loyalty and advoca-



cy; budget process for test and measurement equipment; and demographics.

Questions were designed to help Tektronix learn which test and measurement manufacturing companies customers purchase from along with their perceptions of these companies' strengths and weaknesses, which manufacturers they spend the most with and which manufacturers they considered to be their company's primary test and measurement equipment provider. Participants could indicate the primary reason they buy from each manufacturer, how they allocated their purchases across the various manufacturers and whether they planned to make any changes in their allocations in the future. They were also asked to provide the top three factors that influence their decision to change the budget allocation from one test and measurement equipment supplier to another. To help gain insight into the degree of loyalty and advocacy, participants were asked about their likelihood to recommend and buy again.

Advocacy vs. satisfaction

Much has been written on the topic of customer advocacy recently and findings from such work directed

Tektronix's approach. Advocacy is a measure of behavior, while satisfaction is a measure of attitude.

Tektronix wanted an advocacy score because it decided advocates or promoters were a better measure or predictor of future growth potential vs. customer satisfaction, where there is no direct correlation to growth.

The interview guide was tested and recruitment began. Individuals from Tektronix's top customers within the United States were recruited to participate in the single-blind study. Senior marketing people conducted all of the interviews. Each interview lasted approximately one hour.

An ancillary component of the process required Tektronix to have access to IT and data and to work closely with its sales organization. The company discovered even in these early stages of the process that it didn't know as much as it thought it did about its customers and that it had some major gaps in its data. The process facilitated some welcome conversations with operations, sales and customer service and enabled all of the groups to focus on a shared goal.

Baseline score

The results from the interviews were

Ten tips for researching your customers

1. Always remember marketing is about the customer. We really only rent space in our customer's mind. It is our job to understand why customers buy and don't buy. If you don't know, ask. We also need to remember that customers have choices, and it is our job to give them a reason to make our company their first choice.
2. Never assume you know what your customers will say or that what they tell the sales team is what they would tell a third party. Set aside budget to do more than just an annual customer satisfaction study.
3. There is tremendous value in knowing who among your customers are your advocates.
4. There is tremendous value in knowing who among your customers are your detractors.
5. Brand and loyalty are built one transaction at a time.
6. Focus on the growth drivers.
7. Marketing and sales are two sides of the same coin and must work collaboratively for the company's success. Make the sales organization a part of the solution.
8. Make accountability and metrics a mantra. Only measure what you will manage and no more. There are both good and bad metrics. Good metrics help you make strategic decisions/recommendations, demonstrate how marketing is moving the needle and show the value of marketing from a financial perspective. Create a dashboard that helps you achieve these objectives.
9. While customer acquisition is important, customer loyalty is just as important. Consider investing in developing and implementing a formal customer loyalty program. In addition to lead-generation metrics remember to include customer metrics.
10. Seek advice. Be humble enough to recognize you do not have all the answers.



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compiled and analyzed to determine share-of-wallet and net advocacy score amongst many other insights about the customer base. The findings from the research provided Tektronix with a baseline net advocacy score and leading indicators related to share-of-wallet. The share-of-wallet information for participants surveyed indicates which of these accounts are most likely to increase their budgets and their spending with Tektronix, enabling the company to decide how to best allocate its resources.

Tektronix was also able to look at the analysis and take appropriate actions where it did not have a high advocacy score and to examine accounts and its selling methodology where it had very high advocacy metrics. It's a good example of the maxim "If you can't measure it, you can't manage it." As a result of the research, Tektronix has a picture of the ideal customer account as well as a picture for a key account-at-risk.

With this kind of information, Tektronix can develop plans of action for the latter and replicate the former.

The data is enabling Tektronix to ensure the company is more relevant to the customer and the channel. The data provides insight into what messages are getting through to customers and is being used to direct Tektronix's future marketing efforts. Tektronix discovered the average number of products typically used by a customer in its markets and is developing specific plans to increase its presence in each market segment.

Finally, Tektronix was also able to use this research to identify the three most critical factors to its buyers when purchasing this type of sophisticated electronics equipment. The firm left the study with a new and more developed understanding of its competitive advantages and the places in which it needs to focus its efforts for improvement.

Strong brand

The results revealed that Tektronix clearly has a strong brand and strong preference and awareness. However, the firm learned that market share and brand preference are earned one transaction at a time. The more Tektronix understands the needs of its customers, the more the company can increase its relevancy and empower its customers to make informed purchase decisions to help them solve their test and measurement problems better, faster and more accurately.

Another key outcome of the project is that it initiated all the right conversations between sales and marketing. As marketers, there is a tendency to focus on the customer acquisition side of the equation. We must not forget the rest of the equation - keeping and growing the value of existing customers - and remember that every company should have metrics that reflect this aspect of the equation. | Q

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Guidelines to cooperation

Building a successful customer satisfaction and loyalty research program within a company requires the partnership of several important players. Internal stakeholders often include senior and middle management, marketing and sales teams and varied business and geographical units working with the customer research department. Outside the company, cooperation is required from customers and channel partners as well as the third-party research agency selected to conduct the research.

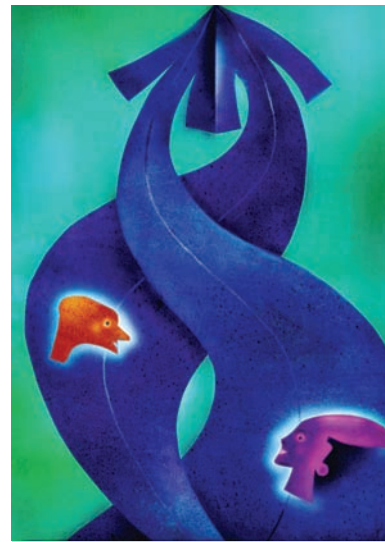
About three years ago, Harris Interactive Loyalty, a division of Harris Interactive, Rochester, N.Y., developed a statistical model of customer commitment based on business-to-consumer (B2C) interactions. This model demonstrated that both rational and emotional connections on the part of customers predicted their behavior. *Quirk's* featured this customer relationship model in the article "Moving Beyond Satisfaction" in its April 2005 issue.

At this time, the customer research team at StorageTek, a data management and storage technology company, had been working with Harris Interactive Loyalty for several years and immediately saw the possibility of applying the commitment model to its business-to-business (B2B) environment. They collaborated in determining that the model could be applied to StorageTek's global customer satisfaction and loyalty surveys. Two subsequent survey waves showed that, even in B2B relationships, emotional factors contributed almost as importantly toward likelihood to recommend as did rational factors.

StorageTek was acquired by Sun Microsystems as a business unit in 2005, and is now a major Sun brand. Following are 10 suggestions for a successful customer satisfaction and loyalty research program, based on collective research expertise, best practices and the B2B work conducted by StorageTek and Harris Interactive.

1. Prepare the organization.
2. Pay attention to the emotional side of customer relationships.
3. Address competitors' strengths and vulnerabilities.
4. Segment customers based on their needs and value to the company.
5. Assess the effect of cultural differences on results.

How StorageTek built its B2B satisfaction and loyalty research program



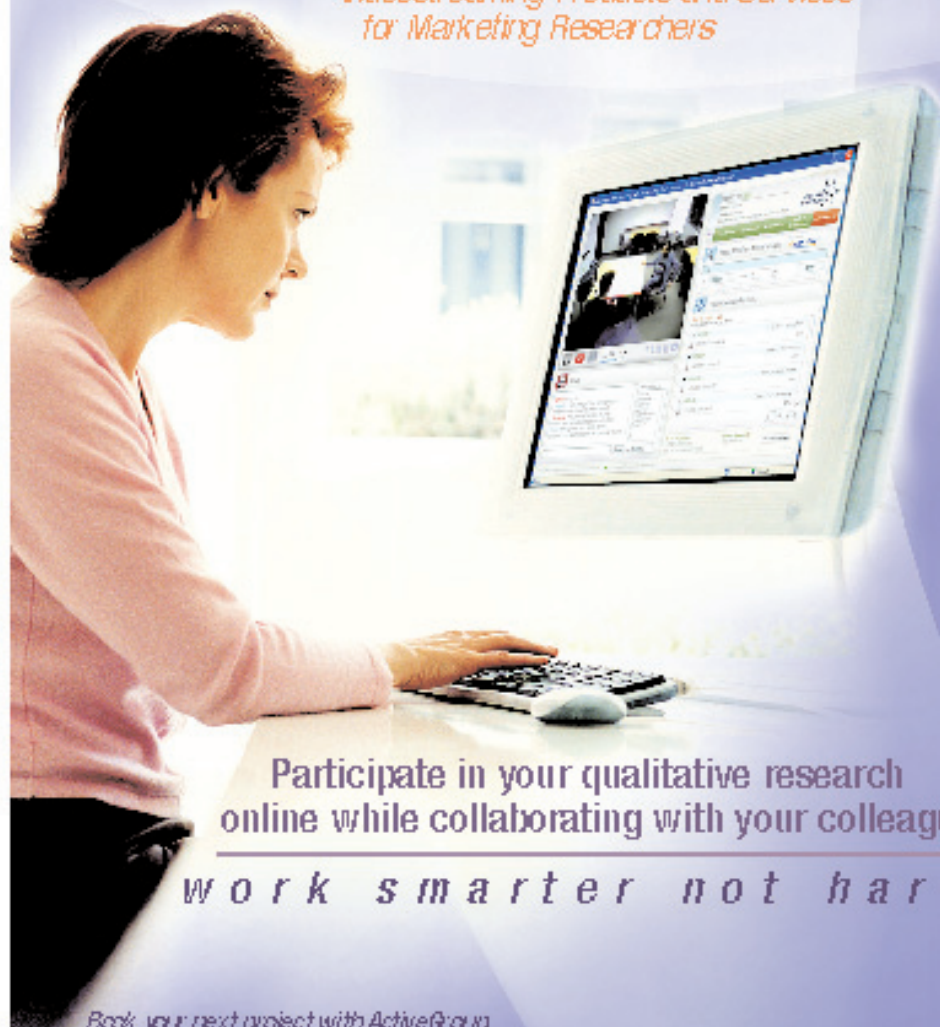
By Hernando Gonzalez and Joan Fredericks

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6. Address channels as part of the customer research process.
7. Communicate and share lessons learned throughout the process.
8. Turn information into decision tools.
9. Create financial linkages.
10. Respond to internal and external needs for change over time.

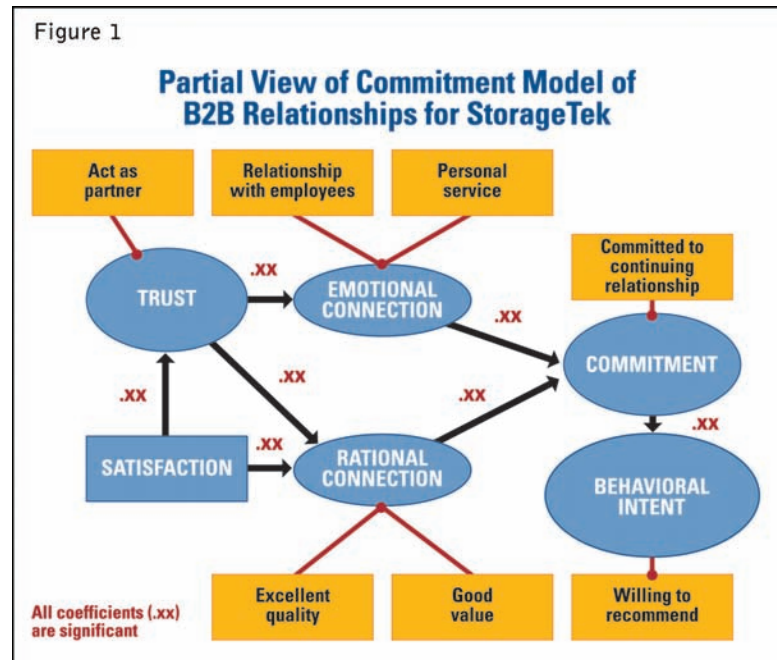
1. Prepare the organization.

In order to succeed, a customer satisfaction and loyalty research program requires support from senior and middle management from the very beginning. Buy-in from marketing and sales teams is often necessary, as they are implementers of survey recommendations and providers of up-to-date account contact information. A large part of this support has to be earned by the customer research team. One way to accomplish this includes using rigorous scientific methods and providing research findings that are actionable at both strategic and tactical levels. After all, the purpose of doing customer research is to provide practical tools to marketing and sales teams to enable them to retain their most profitable customers and continue to win market share among carefully targeted segments.

Another way to win commitment at the field level is to tie the customer satisfaction and loyalty results to a percentage of the annual bonus. Senior management's support of this initiative signals to the field that the company is serious about continuously improving its satisfaction and loyalty scores by leveraging sound, performance-focused research.

2. Pay attention to the emotional side of customer relationships.

Typical customer satisfaction and loyalty research programs do a competent job of addressing functional performance. Surveys generally tend to focus on measuring product quality, service and price perceptions. What is often neglected, however, is the emotional side of customer relationships; yet the most committed relationships are based on creating both rational and emotional bonds



with customers. The result? When customer relationships are strong on both of these dimensions, customers behave in more profitable ways: giving greater share-of-wallet, purchasing more frequently, being willing to try additional products and even being less price sensitive.

Emotional bonds are developed by creating trust. When customers trust a company, they believe it is acting as their partner and is looking out for their best interests. While trust may sound like a warm-and-fuzzy concept, it is built through concrete actions that encompass the way a company manages day-to-day touchpoints with its customers and policies, and the manner in which the company lives up to its corporate reputation and brand.

Here are some examples of specific drivers of trust and emotional connection, based on numerous statistical models built for B2B environments:

- account representatives respond quickly to requests (touchpoint);
- terms of warranty (policy);
- behaves ethically (reputation).

While trust is critical to building an emotional connection with customers, the rational side of customer relationships is driven by satisfaction with functional performance.

Satisfaction is achieved by consistent-

ly meeting product and service quality expectations and delivering excellent value for the cost. Examples of typical B2B satisfaction drivers include:

- reliable products (product quality);
- on-time delivery (service quality);
- competitive pricing (cost).

Path models are useful in understanding complex relationships. The commitment model (Figure 1) shows how trust and satisfaction together created emotional and rational bonds with data storage managers. These bonds in turn explained customer commitment and behavioral intent or loyalty. The attributes in the rectangles are examples of the questions used to measure each construct in the model.

The emotional side of customer relationships in this environment proved to have a strong and significant impact on customer commitment and loyalty. Although the rational side had a somewhat greater weight, the ability to explain customer commitment and loyalty would have been much weaker if the model failed to identify and measure the emotional connection.

As expected, trust supported an emotional connection and satisfaction a rational one. In addition, there were some subtle indirect influences at

work. Typically, satisfaction is created through consistently providing quality and value. In this model, satisfaction contributed to building trust. Trust in turn not only explained the emotional side of the customer relationship but also influenced the rational side. This meant that the more StorageTek acted as a partner to its customers (along with other trust-building behaviors), the more customers believed in the quality and value of its products.

The complete model contained detailed diagnostics, showing how improvements in specific products, services, pricing, reputation and other attributes affected trust, satisfaction and the emotional and rational connections with customers.

3. Address competitors' strengths and vulnerabilities.

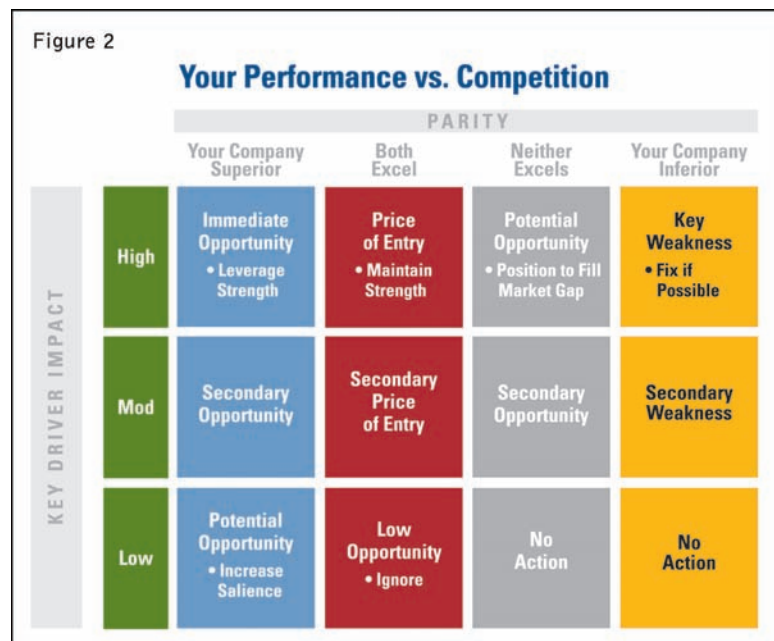
While customer loyalty research professionals might take this for granted, a surprising number of B2B companies focus their research solely on their own performance. They may go so far as to measure their customers' ratings of competitors without obtaining a true benchmark based on competitors' customers.

StorageTek developed a comprehensive research process, addressing its own customers as well as those of its competitors. This provided the business unit with a clear understanding of its competitive position, and the ability to leverage unique strengths to increase share-of-wallet and attract new business among targeted segments.

Ideally, a complete picture of customer loyalty will cover all of the components shown in Figure 2. An understanding of a company's performance, its competitors' performance and the impact on loyalty of each attribute will chart the course to identifying and achieving clear improvement priorities.

4. Segment customers based on their needs and value to the company.

Most B2B companies segment their market in some way. The segmentation may be based on firmographics such as size or revenue, ver-



ticals or some other characteristic.

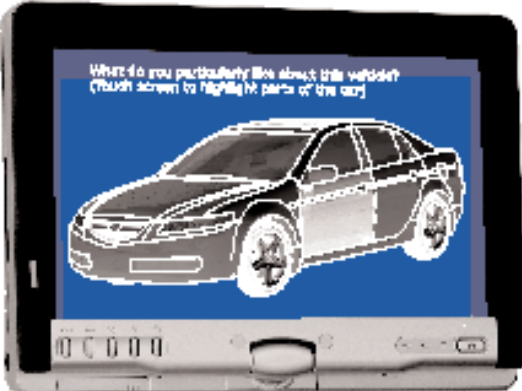
The shortcoming of this view is that the segmentations may be suboptimal. When companies use segmentation in building a model of customer loyalty, they need to ask themselves

the following:

- Is this the best way to segment the market?
- Is the segmentation scheme valid?
- Are the most profitable segments being targeted? Are we using the


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Figure 3

Fictional Market Segmentation and Targeting Example



most effective strategies?

StorageTek recognized the importance of segmenting its market in line with these considerations. With Harris Interactive's help, it conducted a segmentation study to assign customers and prospects to groups that shared commitment drivers (needs) and targetable characteristics. This enabled it to assess the value of each segment to its business and develop compelling value propositions required to attract and grow customers within the highest potential segments.

Figure 3 is a fictional example of the type of segments that can be uncovered through customer loyalty research.

5. Assess the effect of cultural differences on results.

When confronted with results of customer loyalty research, many have been heard to say, "My customers are tougher graders." Customer research lore is full of anecdotal evidence of cultural or country differences in results. But how can one know whether these differences represent tougher-to-please customers or just differences in the ways customers use rating scales? And, even more importantly, how can one level the playing field when using customer loyalty

research results to compensate managers who are responsible for different geographic, ethnic or cultural groups?

This becomes especially complicated in today's flat world, where a given customer may have been born in India, educated in the U.S. and is currently working in Singapore. Just applying a country-level "correction" fails to capture the individual differences behind the research results. Different individuals use scales in different ways. For instance, on a satisfaction scale of zero to 10, one person gives scores centered around the

midpoint, so a score of eight is exceptionally positive coming from this person. Another gives scores that are relative to the positive endpoint. In this case, 10 is this person's most common score, so a score of eight is a sign of disappointing performance.

Figure 4 shows how a score of eight from different types of individuals might be interpreted based on their usage of a zero-to-10 scale.

When these individual differences are rolled up at a country or regional level, they can have a substantial impact on results. Figure 5 shows country-level differences from the European average, based on ratings of hundreds of products using a zero-to-10 rating scale.

When communicating their customer loyalty research results, StorageTek faced similar questions about culturally-based differences from its regional and country managers. In the particular approach that Harris Interactive used for StorageTek, respondents were asked a brief series of rating questions across a wide variety of products and services. Their evaluations of these carefully selected brands uncovered inherent patterns of scale usage at the individual respondent level. These patterns were then used to apply an individual correction to remove noise, in the form of response bias, from the data.

Depending on the range of responses and the available respon-

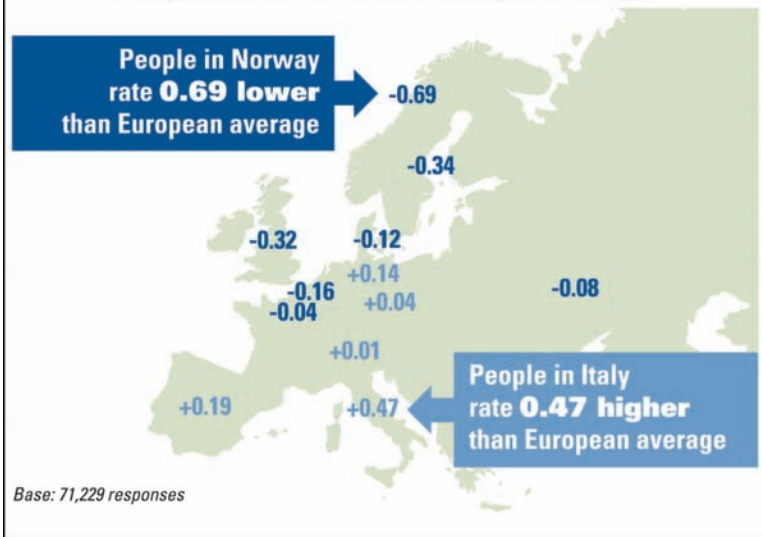
Figure 4

Illustration of Response Bias

Four types of respondents	Average rating (Scale of 0-10)	Interpretation of a score of "8"
Very High Graders	9.19	Poor
Somewhat High Graders	8.59	Mediocre
Somewhat Low Graders	7.71	Good
Very Low Graders	6.48	Excellent

Figure 5

Example of Nationality Effect Within Europe:
Rating Scale Differences from European Average



dent profiling information, a variety of approaches can be taken, some without the need for additional cross-category ratings. The important point is that, while some types of

respondents are more homogeneous in their scale usage than others, assumptions about scale usage need to be tested for the specific customer population at hand. Results can then

be adjusted as needed, so that results from country to country or among other subgroups of interest are comparable.

6. Address channels as part of the customer research process.

B2B markets often rely on fairly complex channels: value-added distributors (VADs) and value-added resellers (VARs), as well as traditional distributor and retailer relationships. Depending on the industry, an indirect customer may or may not even be aware of which company's product or service they are purchasing. B2B companies are dependent on their relationships with these channels, as well as the relationships the channels have with their customers. Best practice customer loyalty research calls for addressing these channels both as partners and as customers in their own right. Figure 6 illustrates channel/partner "triangulation" in B2B relationships with customers.

StorageTek and Harris Interactive

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Figure 6

Channel/Partner Loyalty Management



understood the critical role of channel partners and designed the customer loyalty research process to address channel/partner triangulation. This led to a full understanding of how customers who purchased indirectly were affected by channel relationships as well as StorageTek's own performance.

7. Communicate and share lessons learned throughout the process.

The most tragic event that can befall a customer satisfaction and loyalty research program is to end up with reports that no one reads or cares about. Consultation with business unit managers and teams in different geographies begins with the preparation of the survey questionnaire. In the end, every research question has to be tied to a business objective.

The consultative process continues over time, with every survey iteration. As each research wave comes to an end, the customer research team needs to interpret, analyze and share findings and recommendations at different levels. Sharing does not have to end with meetings and Webinars. The customer research team can build an internal Web site (portal), with different levels of security clearances, to

enable marketing and sales teams, as well as members of senior management, to access previous reports, and even data, for additional analyses.

8. Turn information into decision tools.

Customer research teams need to convert research data into meaningful findings and recommendations. If the internal stakeholders are adequately consulted on the front end of the research, there should not be any problem in understanding and using the research when the analysis and recommendations are submitted. Customer research teams that fail in this task very often do not identify the most important business objectives and priorities of business units and regional or country managers. As a result, these managers and their teams may not find anything useful or relevant in the reports.

Simplifying complex statistical reports is not an easy task – it requires a different way of communicating at various levels of the company. Reporting at the senior management level very often requires global overviews and empirically-based generalizations, while communicating at the sales team level means providing them with factual details relevant to their

specific conditions, target customers and geographical areas.

Harris Interactive turns its statistical models for clients into desktop simulators so that management can play what-if games to estimate the impact of specific improvements on customer loyalty. These simulators can incorporate the effect of planned organizational initiatives to improve customer loyalty.

9. Create financial linkages.

Customer satisfaction and loyalty does not mean keeping every customer in every case. For example, in those industries where 80 percent of a company's revenue comes from only 20 percent of its customers, it makes sense to identify which customers belong to the 20 percent that matters. Without question, those are the customers that a company must delight and whose expectations they must exceed.

On the other hand, how much of the remaining 80 percent of its customers should a company keep loyal? How profitable are those customers? This may require further segmentation by level of profitability, because some customers may simply not be worth the effort. If the company loses money or just breaks even on every transaction, efforts should be made to convert these customers into more profitable customers. If that is not possible, then the company has to consider whether keeping those customers is worthwhile. This is the true test of any customer loyalty research program. Trying to keep every customer may, in the end, be a great disservice to the company.

10. Respond to internal and external needs for change over time.

The search for relevance never ends. Market conditions change. Competitors and substitute products or services alter the landscape. Marketing would be too easy if a company were always first with disruptive innovations or leading-edge products. But that scenario rarely

happens. Customer research teams need to be in tune with what is happening in their industry, in the key verticals that their company serves, and with their customers' unmet needs and wants.

The customer satisfaction and loyalty survey questionnaire has to change over time to reflect these conditions. The key changes may be small from one year to the next, since comparability between time points is an important consideration. Over a longer period of time, however, those cumulative changes would make the survey questionnaire a more sensitive instrument. Some questions may change in meaning, or may no longer be relevant, given certain developments in the market.

Again, suggestions from customers, marketing and sales teams, and managers in close touch with industry developments and conditions are invaluable resources. Listening to customers and learning from what they would like to do, but are unable to do, with current products or services will open up new opportunities.

Critical component

These are just 10 of many best practices for developing and implementing a successful B2B customer satisfaction and loyalty research program, based on past experiences of StorageTek and Harris Interactive. Building customer loyalty and retaining profitable customers is a critical component to any company's prosperity. There are many factors to consider in the design of a comprehensive customer satisfaction and loyalty research program, particularly the emotional side of customer relationships. By strengthening both rational and emotional bonds in its business relationships, StorageTek, as part of Sun Microsystems, stores more digital archival data than anyone else (Freeman Reports: The Growing Importance of Archive, May 2006 <http://www.freemanreports.com/pdf/STKArchive.pdf>). | Q

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Questionnaire design from the trenches

Interviewing an executive is a performance that takes intellect, perception and boldness. There are no guarantees on how the conversation will unfold but a well-scripted questionnaire goes a long way in producing an interview that you will be happy with. This article is about how to best script your questionnaire so you get the most out of your conversation with any executive.

Executives are individuals with strong egos and equally strong opinions. Rather than merely surveying executives, you conduct guided dialogues with them. Having a dialogue makes it an equal exchange; the executive feels gratified for getting something from the conversation and is much more likely to open up about key areas of information.

Thoughtful preparation of the questionnaire with the executive respondent in mind will also be more effective in addressing the key areas that are of concern to your clients. There are ways to structure the questionnaire so you get the most from your conversation with the executives.

- Rapport

Building good rapport is extremely important in depth interviews. It makes the respondent open up and makes him or her feel comfortable. Someone who feels comfortable is likely to share more information. There are ways to build good rapport with a respondent right away. The following approaches have proved to be very effective.

a) Ask about his or her role within the organization. This gives the respondent the chance to talk about him or herself. The discussion about the role within the company exposes the respondent's

responsibilities so that you can gear the questions towards those areas. Being more focused on the respondent's responsibilities will also keep him or her more engaged and will help you get more information.

This is also a very safe way of gauging the respondent's style of conversation and mood, further aiding rapport-building.

b) Ask about successes. This works very well in establishing rapport. It gets the executive to focus on his or her key areas of achievements in the last year and elaborate on how his or her group did. People like talking about their own successes and this question



By Srijana Dhakhwa

Depth interviews with executives

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makes the executive share a lot of information about the priorities and how well those were achieved.

c) Ask about challenges. After the executive has talked about successes, ask the individual about the challenges his or her team currently faces. The information that the executive otherwise might not have shared is more easily obtained if the question on challenges is asked after the question on successes. People seem to be more open to discussing the negatives just after they have basked in their own positives.

The question on challenges also smoothly opens up dialogue about the key focus areas for the coming year.

d) Drill down into details. Now you can drill down into details about areas that you are interested in, whether they be operational strategies, marketing strategies or other issues.

In each section of detailed questions, however, stay with the basic format of asking positives before the negatives.

- **Logic**

The importance of logical flow in a questionnaire cannot be overstated. Any misstep in logic, which might be forgiven when on paper, can haunt you during the interview. So each question has to have a reason and each question needs to be logically related to the one prior.

When conducting an interview you are tapping into the respondent's natural thought process. This thought process is initiated by your opening remarks or the first set of questions you ask. A well-constructed and logical questionnaire stays with this natural thought process, thus extracting the optimum amount of information from the individual. Jumping away from the respondent's thought process takes you into dry territory and you end up with little useful information.

Do not confuse a questionnaire for a depth interview with a quantitative survey questionnaire. I see this often. A researcher wants to make the depth interview questionnaire

like a survey tool. Anyone going through market research 101 knows that results from depth interviews (unless one is lucky enough to have a lot of them) should not be used to make quantitative conclusions. Depth interviews are to gather information on ideas, trends, issues, etc.

Having said that, it is very common to use multiple-choice questions, particularly questions to rate and rank information in depth questionnaires. It is crucial that these multiple-choice questions are properly placed. The best places are at the beginning or the end of a section, depending on how important these questions are. The thought pattern needed for multiple-choice questions is different from the thought pattern needed for open-ended questions. Thus, placing a multiple-choice question in the middle of a concept can disrupt the thought process of the interview and thus prevent good information flow. It is also essential that the question itself as well as the choices in the multiple-choice question flow with the logic of the questionnaire.

- **Screening**

Keep questions related to screening or qualifying to a minimum when talking to senior executives. Executives want to conduct a discussion, not be surveyed. Nothing says "survey" like a series of qualifiers.

- **Focus**

Every concept has to be distinct and clearly differentiated otherwise it will confuse the respondent. For instance, a question such as the following leaves the respondent confused and unsure as to what to focus on:

What are the potential challenges of using mobile organizers or laptop computers?

It is not clear whether the respondent is supposed to address mobile organizers or laptop computers or both. You have to separate

these two subcategories.

If providing options, make sure they support the main question. You want each question to be focused on the main theme. Options that do not support the main question will distract the respondent.

Here is an example of what not to do:

Are you involved in the investigation decision to evaluate the use of telecommunications solutions?

Yes, I am involved in the investigation and/or selection process to outsource additional agents

Yes, I am involved in the investigation and/or purchase decision for new technology solutions

No

An alternative way of asking the same question is the following. Here the options support the main question, rather than reiterating the question in different forms.

What is your involvement in the purchase process for telecommunications solutions? Check all that apply.

Involved in the investigation to outsource additional agents

Involved in the selection process to outsource additional agents

Involved in the investigation for new technology solutions

Involved in the purchase decision for new technology

Not involved

- **Eliminate redundancies**

Redundancies can kill rapport with the respondent and at times bring the interview to a halt. Eliminating redundancies is both a science and an art. It is a science because we can simply eliminate redundancies by consolidating similar questions. It is an art because respondents might address issues in the course of the discussion that are later specifically included as a question. It takes an attentive and skillful interviewer to avoid redundancies in such cases.

For example, asking the following three questions about the same solution is redundant.

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What, if anything, is most compelling about this solution?
 What benefits would you hope to achieve with such a solution?
 What would be the key criteria you would use to evaluate this type of solution?

A product is compelling to a buyer because of the benefits and a buyer uses the most important benefits as the criteria for evaluating a purchase. These three questions will elicit the same answers.

Here is an example of a potential

area of redundancy that requires experience to avoid:

What is your reaction to that solution?
 What is most compelling about this solution?
 What is least compelling about this solution?

If the response to the first question addresses either of the other two, the interviewer has to know not to ask for the same information.

• Phrasing

Some ways of phrasing questions call for open-ended, opinion-based responses. Some call for crisp, multiple-choice-type responses. The wrong phrasing can lead to a very ineffective discussion.

For instance, when you start a question with “what, why, how, who, when” the respondent’s mind instinctively wants to give an opinion and would start forming one. You will stifle the flow of conversation if you follow a question that starts with one of the above with a list of multiple choices.

Here is an example:

What type of a structure have you implemented?
 Structure A
 Structure B
 No preference/ideas

The following rephrasing of the question is more effective:

Which of the following structures best represent what you have implemented?
 Structure A
 Structure B
 No preference/ideas

Similarly, the following question prepares the respondent for an opinion:

Please describe the breadth of your service coverage:
 All regions
 Northeast only
 Southeast only
 Other

Rephrase it as follows:

Which of the following best explains your service coverage?
 All regions
 Northeast only
 Southeast only
 Other

Guided dialogues

Treating depth interviews with executives as surveys will not get the most effective results. Treat these interviews as guided dialogues. A tightly scripted questionnaire will help this dialogue proceed smoothly and will increase the chance of an effective interview. | Q

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The challenge of fieldwork

In the last 10 to 15 years, business-to-business (B2B) research has made a transition from being centered on generating sales leads to becoming a marketing-focused tool. Even though many fundamentals of consumer research apply, B2B research requires a different execution in the field. Professional respondents are still people, and have similar motivations to consumers, however the environment in which they make decisions – and where research is fielded – is different.

B2B market researchers are faced with many challenges when undertaking fieldwork such as insufficient sample sizes, dubious data quality and a significantly higher cost for conducting the study. This article asks why B2B fieldwork is so demanding and how the issues faced can be overcome.

Greater emphasis

It seems that competition within the B2B marketplace has intensified recently, with greater emphasis placed on developing targeted B2B marketing strategies. As a result, clients have increased their requests for solid B2B research and specialized B2B market research companies have seen steady growth across industries as varied as agriculture, health care, IT and telecoms.

In the absence of extensive consumer-like panels, successful B2B research companies have responded to this demand by using a wide range of primary fieldwork methodologies.

What are the differences between B2B and consumer research? Many skills and methods are transferable between the two disciplines. However, it has been my experience that the challenge of interviewing the right respondents within relevant companies offers an interesting and sometimes

exasperating barrier to successful research.

In B2B fieldwork, it takes longer to find and qualify respondents, it is harder to elicit cooperation and stronger incentives are often required to encourage participation. Business interviews require specialist interviewers who can connect with executives and who understand the challenges involved.

In business-to-business research the devil is often in the details



By Owen Jenkins

Editor's note: Owen Jenkins is managing director of research firm Kadence Boston. He can be reached at ojenkins@us.kadence.com.



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Good planning

Effective research requires good planning. This is true for both consumer and B2B. Table 1 illustrates an example plan linking business objectives to outcome. Good pre-fieldwork planning can have an enormous impact on the fieldwork phase, resulting in cost-effective research and solid data. The challenges of B2B fieldwork relate to two of those strategy questions illustrated in the table: "Who has that information?" and "Can we capture the information in a valid and reliable manner?"

Table 1: Research strategy planning

1. What decision do we need to make?
2. What information will help us make the right decision?
3. Who has that information?
4. Are they willing and able to give it to us?
5. Do we understand their point of reference?
6. Can we capture the information in a valid and reliable manner?
7. How will we analyze the information?
8. What is the cost and how long will it take?

Gathering information

B2B marketing strategies require an understanding not only of the external market dynamic and internal corporate structure but also the decision-making process of the organizations involved. A B2B market researcher is required to relate to their client and their business needs and at the same time understand the structures of the businesses in which the respondents work to ensure the correct person is spoken to.

A recent example observed by Kadence was that of decision-making in the golf course business. Golf courses have a superintendent who maintains the course and a manager who runs the business. The superintendent recognizes the need for a new piece of maintenance equipment (for example a greens mower) and submits the request in the annual budget. The manager approves the budget. Who has the greatest influence on the purchase decision?

As the example demonstrates,

business decisions are often group efforts, with information gatherers working alongside end users of a product, managers of end users and vendor selectors. One popular option is to "follow the money," which may lead you to the decision maker, but more likely the finance department. These respondents may be aware of the products and services being purchased, however they are often unfamiliar with the detailed attributes of the product/service being researched.

It is therefore essential that within B2B research a very clear description of the responsibilities of the respondent is established. It is vital that time is spent clarifying this with the client and ensuring that any research undertaken meets the information needs.

As a group is involved in making business decisions, this can also lead to other split decisions, an example of which is in the information technology sector. Technicians in the IT department are responsible for ensuring that new technology is compatible with the existing infrastructure and standards, but it is the business professionals using the equipment that drive the need, and they will be involved in the decision-making process to ensure that the technology helps to achieve business objectives. Clients that we have worked with have identified that the business managers can find the money to invest in improved productivity while IT departments are viewed as an administrative cost and have limited spend.

Another important factor when discussing purchasing habits with a respondent is establishing if it operates a preferred vendor list. This is particularly true in undertaking government research where vendors are screened to meet a set of specifications. The purchaser then picks between vendors.

For example, Kadence was asked to undertake a relatively simple project to understand why nursing homes purchased a certain house-keeping product. Research initially

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started by asking for the person responsible for the purchase of housekeeping products. While it was apparent that the initial respondents knew all about the product and its uses, they only renewed orders from a pre-agreed vendor list but were not involved in choosing the vendors that would qualify.

Recommendation: Business decision-making is often a complicated team effort. Asking a field team to interview the “key decision maker” is asking for unreliable data. The market researcher must understand the decision process and target the specific roles within this process.

Replicating the interview

The task now moves to replicating the interview on a quantitative scale. Our firm often receives requests for proposals to interview high-level respondents in well-known companies of the Fortune 500. Respondents in such a survey would hypothetically include individuals who you may know by name such as Michael Dell, Larry Ellison and Steve Ballmer. Such a request is financially prohibitive and practically impossible to complete. Additionally, the data quality may be uncertain. For although the respondent has a comprehensive, macro view of the company, their understanding of ground-level processes is limited, and often, this is the data required.

It is also difficult to extrapolate data from such large companies as their internal processes are so unique that they cannot be combined to create generic recommendations from the study. In such circumstances, where a particular company does need to be included in a survey, we recommend conducting an in-depth, independent investigation of their purchasing procedures.

Many B2B market studies do not center on the Fortune 500, and valid, reliable data can be obtained from a robust sampling frame. This requires an accurate estimate of the sample universe. Below are some

hints to help this process:

- Companies can be hard to define

Most business researchers start with a definition of industries under investigation using Standard Industry Classifications (SICs) or the more recent North American Industry Classification System. As with any standard of classification, these can be clunky: Companies are classified

under more than one SIC or definitions can be too broad. It is also important to realize that classifications are not transferable across countries – for example, U.K. and U.S. SICs are not the same.

SICs are also based on company output – that is, the product they manufacture or the service they offer. Your research is more likely to be linked to a business process which will take further defining. We

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have conducted IT surveys investigating companies with large data processing requirements. We worked with the client to focus on industries such as media, entertainment and financial services but still needed to qualify by phone.

- Most companies are small

According to a government census, 73 percent of businesses have under 10 employees¹. The actual figure may be even higher as the government census does not include companies with no paid employees, such as the self-employed. A study based on a random database sample will result in the majority of interviews taking place with smaller companies. It is essential that you inform your client of this before undertaking the project.

- Business databases date quickly

One of the strengths of the U.S. economy is that it creates a large number of jobs each year. It also loses jobs through increased produc-

tivity, outsourcing and other attrition. Eighty percent of businesses do not survive five years. The majority of lost companies are small businesses but large companies are sold, merged or acquired. The roles and responsibilities of employees also change at a high pace - just look in your address book. Assuming the data on your sample was correct at the beginning, it will not be for long. Therefore, B2B researchers need to not only check information before commencing an interview but also ensure its viability throughout the study.

- Client databases

A B2B market researcher may sigh with relief when they hear that the client is supplying a database. However, our firm has noticed that these can be more difficult to obtain than originally promised - in other words, extremely slow to arrive. As client databases are not held for commercial purposes, they may need to be de-duped and formatted. This

can result in a B2B researcher's IT department requesting a week to prepare an unknown client database compared to one hour for commercial data from a provider such as Dun & Bradstreet.

- Incidences

Two B2B projects with the same incidence can have widely different fieldwork costs - depending on how easy it is to discover the qualifying attribute. Qualifying questions that can only be answered by the potential respondent will involve an expensive screen-out process as three levels of respondents will need to be spoken to: receptionist, departmental (gatekeeper) and target respondent. Using qualifying questions that can be answered by the receptionist is much cheaper but is less accurate.

We recommend - where screen-outs are costly - to interview non-users of the product or service being researched, allowing the study to build a competitive map.

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Understand the market

Valid and reliable data is achievable in business research by choosing partners who understand the market and the needs of the fieldwork phase and by investing time and resources into the selection and preparation of databases.

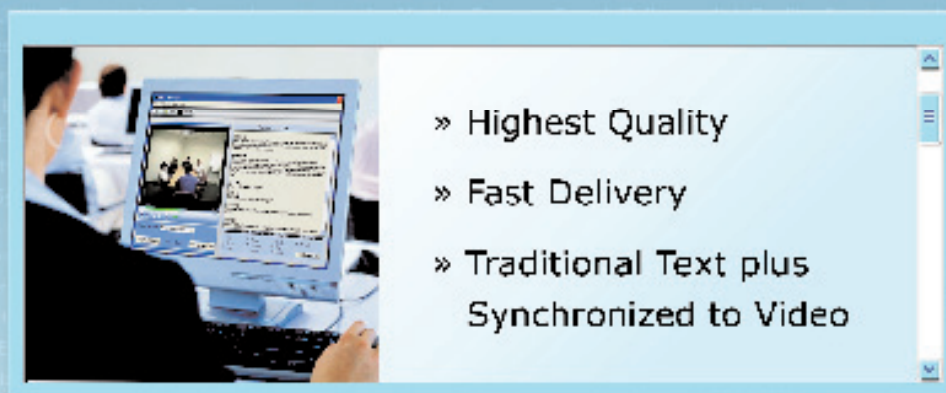
To achieve a good outcome for a B2B client it is important to ensure that the fieldwork is executed in a professional manner and that the respondents involved are relevant to the study. Our firm has been surprised by client experiences in this area caused by consumer research practices being replicated in the business environment. Although the techniques are the same, the complexity of the sample and the number of individuals involved changes the fieldwork activity dramatically. | Q

Footnote

¹County Business Patterns / Release Date: 12/31/2006
Sector 00: 2004 County Business Patterns: Geography Area Series: County Business Patterns by Employment Size Class: 2004.

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Look for the similarities

Very little has been written about what makes a good segmentation. In this article, I will tackle that topic by exploring 10 guidelines. The first five are methodological goals. The remaining five are marketing goals.

Five methodological guidelines

1. *Similarity within segments*

A good segmentation must find a set of objects (whether individuals, companies or products) that are similar to each other. Finding similar objects is not always easy. For one, there is the issue of “On what basis (topics) are the objects similar?” In addition, there is the issue of defining similarity: How similar is similar? For example, say you have decided to segment your market by company size. You will still face the issue of defining what counts as similar size ranges. Even with a concrete topic like size, it can be hard to make a clear decision rule about size breaks. Is a company with 25 employees more like a five-employee company or more like a 250-employee company? The solution is often to hope for a logical break in one’s database. For example, one may find that most companies with 25 employees do not have a separate HR benefits manager. If one is marketing HR benefits (health insurance, 401k plans, legal assistance), the 25-employee company will probably be seen as more similar to a five-employee company.

Number of employees is a fairly objective topic. When the segmentation topics are intangible attributes, such as attitudes or preferences, defining similarity can get even messier. Fortunately, multivariate algorithms can automatically investigate the covariance among dozens of input variables to see

where they clump together and to find bumps or piles in a multidimensional plane.

2. *Differences across segments*

The second goal of a good segmentation is to find groups that are clearly distinct from each other. Groups with fuzzy boundaries are the blight of good segmentation models, at least as they are usually conceived. Finding differences across segments is connected to the first goal of finding similarity within segments. The two goals are corollaries. In statistical terms, it is sometimes even said that the variance (dis-

Ten guidelines for a good segmentation



By Peter Flannery

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tance) across groups should be maximized while the variance within groups should be minimized. In other words, people within a group will look similar, but people in other groups will look different.

3. Interpretability of segments

Once groups have been found, it is common to interpret and name the groups. Sometimes interpreting a segment is easy. Consider, for exam-

ple, a group of individuals whose data shows that they love all types of food, both diet and regular foods. They frequently visit restaurants, buy upscale kitchen appliances and watch cooking shows. The interpretation of this group is straightforward. Thus, marketers are free to wordsmith on a catchy name for the group, such as Yummies, Food Lovers or Foodies. Whatever its final name, this segment gets an A+ on interpretability. It is

internally consistent, coherent and compelling.

Unfortunately, statistical algorithms can also come up with segments that don't make sense. Segments may be non-interpretible. For example, consider a hypothetical Adventurers segment. Their data show that they like to take risks on outdoor hobbies, drive fast and play Lotto more than other segments. So far, so good. However, elsewhere their data say that they are low on watching dramas and fright shows, they will not experiment with new products, and they index higher on wanting airbags than on wanting horsepower. One can slap the name Adventurers on this group, but the overall interpretation of the group is suspect. This segment gets a C- on interpretability.

Technically, a segment does not need a coherent interpretation to be valuable. A portfolio of stocks, for example, can lack a consistent theme and be poorly named, yet it may still be profitable. For most marketers, however, it is difficult to accept any segment that lacks a common-sense interpretation, let alone a catchy name.

4. Measurability of segments

Segments differ on how well they can be measured. Sometimes, segments can be identified with relatively objective measures such as gross revenue, vehicle ownership, shoe size or type of hospitalization (e.g., acute vs. rehab). These are cut-and-dried topics that are fairly easy to measure. Other times, however, segments can only be identified with subjective topics such as new technology attitudes or computer brand loyalty or health care services knowledge. The latter topics are more difficult to measure.

Of course, questions about such attitudes, loyalty and knowledge can always be asked. But respondents may struggle with these questions. The same respondent may even give different answers to the same question, just because the question is ambiguous. Ideally, you will pilot-test and refine any ambiguous questions

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before you build a segmentation model on those questions. Alas, time does not always permit such pilot testing and refinement. Time or not, a good segmentation still requires good measurement.

5. Stability of segments

There are many types of cluster analysis. Most cluster analysis techniques will always make segments. When there are clear and natural breaks (real divisions) in the data, most techniques tend to get the same answer. But watch out: when the data are flat, and when there are few real divisions in the data, the various techniques will still make segments. The problem is that the resulting segments are arbitrary. They are neither reliable nor stable.

Methodologically, there are a couple of ways to assess segment stability. Neither method is perfect. Some experts track the number of weakly-classified respondents - that is, the number of respondents who sit on the border between segments. If the

number of borderline respondents is too high, the segmentation solution is deemed unstable. Other experts prefer to use cross-validation techniques to index stability. Here, for example, one may split the sample into odd- versus even-numbered records (or ID numbers). Do the split samples share the same cluster solution? Sample sizes are often small in B2B research, potentially ruling out the split-sample approach.

Fortunately, both methods of measuring stability are acceptable. In fact, either method would be an improvement for most segmentation studies.

Five applied-marketing guidelines

6. Size of segments

Size matters when it comes to segments. Your key segments must be large enough to support revenue generation. By default, junior marketers often look for segments that are at least 20 percent of consumers, hoping that their 20 percent target segment will provide 80 percent of the available profits. They are follow-

ing an idealized Pareto rule, which indexes at 400 percent. There is no harm in following this expectation, but it rarely works.

More often, marketers are lucky enough to find that 15 percent of consumers generate 45 percent of profits (a 300 percent index on a smaller base). In hyper-segmented markets, one's target segments are often much smaller. For example, one may have to settle for a segment that accounts for 10 percent of consumers, 16 percent of profits, and thus, indexes at 160 percent.

Obviously, the hypothetical segment sizes and index scores illustrated above are not benchmarks. Rather, the acceptable size for segments depends on your business model and industry.

7. Availability (accessibility) of segments

Just because a segment is easy to measure (per Guideline 4) does not guarantee that the segment is easy to find. Segments can be inaccessible simply because they are defined on

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non-public topics - that is, on topics that are not available in syndicated databases. A shoe company can easily define consumer groups by shoe width, but it will be hard to find a database that provides access to double-E-width consumers.

Likewise, C-level executives (CEO, CFO, CMO) are easy to define as a segment. However, C-level executives are notoriously inaccessible. They often hide from marketers, let alone from marketing researchers.

The two guidelines of measurability and availability interact in the future recruitment of segments.

After making a successful segmentation model, marketers often want to create a short survey (or segmentation screener) to find more segment members, either for future marketing research or for sales calls. The fewer the questions, the easier it is to implement this segmentation screener. In some organizations, the segmentation screener takes on a life of its own. It becomes the de facto segmentation for years to come, long after researchers have forgotten the original segmentation study. In such cases, the screener must work well with all the normal and easily accessible sample sources, whether phone, mail or Internet sample sources.

8. Brandability of segments

By brandability, I simply mean that a brand does well in a key segment. By now, if you have made it as far as Guideline 8, it is possible to evaluate whether a specific segment can be adopted as a priority or target segment for your brand.

Ideally, your brand will score high in your proposed target segment. Actually, your brand does not need to score high in absolute terms. Rather, your brand just needs to index higher in its target segment. For example, if your brand has 14 percent purchase interest across the whole sample, you may be satisfied with a target segment that has 22 percent purchase interest in your brand.

All the better if your main com-

petitor indexes poorly in the target segment. Besides scoring well on purchase interest, your brand should also score well on brand metrics such as awareness, uniqueness, favorability, loyalty, etc. Brandability can also require strong performance on brand imagery ratings such as quality, dependability, safety, efficacy, luxury, friendship, fun, etc. This is a matter of brand positioning. Within your target segment, your brand's imagery ratings should lean toward your brand's prior stated positioning.

9. Profitability of segments

In the past, researchers seldom attempted to estimate the profit of segments. Nowadays, it is becoming common to estimate segment profitability, even with survey data. Segment profitability can be calculated many ways. Here is a simple method.

Eq. 1: Relative Profit Index = "Size" x "Income" x "Brand A Purchase Consideration" where, for each segment, there is a measure of:

- a) Size = Size (of the segment)
- b) Income = Average income
- c) Brand A Purchase Consideration = Definitely Will Buy Brand A

Profitability indices differ on their degree of complexity and completeness. Equation 1 is admittedly simplistic and limited. It should not be used to forecast sales volume. It can be used, however, for a topline financial analysis of segments. Even better indices are available, if one includes terms or adjustments for d) disposable income or purchasing power, e) brand loyalty, f) willingness to switch out of a competitive brand. To develop a ROI analysis, it is necessary to include terms for g) marginal costs of production and marketing and h) marginal gains from incremental sales, that is, sales beyond one's current portfolio of products.

10. Communicability of segments

Even if all nine guidelines above

are met, a good segmentation still needs one more asset. A good segmentation must be easy to communicate. Even the best segmentation scheme can fall flat, if it cannot be easily understood and communicated within a company. The name of a segment (e.g., Foodies, Adventurers) is the main way that a segment gets communicated. Obviously, care must be taken to select a name that is descriptive. Beyond the segment name, the main way to increase communication is with eye-popping visuals. Here, it is important to create and use multiple pictures or collages. No one visual should be allowed to represent a whole segment, lest the future interpretation of that segment become too pigeonholed by a single photo.

To optimize communication, researchers may have to sub-optimize other guidelines. For example, to improve communication a researcher may select a five-cluster solution even though a 12-cluster

solution performs better on some of the guidelines mentioned above.

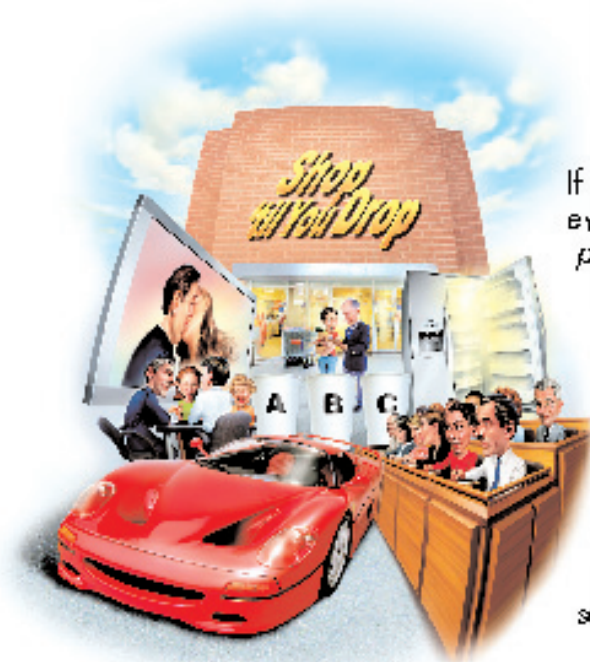
Meet all 10

I have shared 10 guidelines for a good segmentation. These guidelines are balanced between methodological guidelines and applied marketing guidelines.

Few segmentation schemes can meet all 10 guidelines without encountering some degree of trade-off. To improve the communication of the segmentation (Guideline 10), one may have to select segments that are slightly harder to measure (Guideline 4). To improve the brandability of segments (Guideline 8), you may have to adopt segments that are slightly less differentiated across segments (Guideline 2). Such trade-offs are endemic to segmentation research. Assuming that the segmentation scheme performs satisfactorily on both guidelines, researchers will have to decide which guideline gets priority. Some companies will seek maximally profitable segments

(Guideline 9), sacrificing a bit of interpretative clarity (Guideline 3). Other companies will need crystal-clear interpretations, knowing that extra profits will never be tapped unless the segments sound compelling. Just as long as performance on both guidelines stays above acceptable levels, you are free to optimize the guideline that best meets your business needs.

Trade-offs among the guidelines will exist, regardless of whether researchers acknowledge the trade-offs. A novice researcher can sometimes make good trade-offs just by intuition or luck. Most often, however, the best trade-offs are made by experienced researchers who are conscious of the 10 guidelines and their implicit trade-offs. A bad segmentation will ignore and stumble through the 10 guidelines. A good segmentation will acknowledge and balance all 10 guidelines. A great segmentation will foresee and optimize the 10 guidelines for your exact marketing needs. | Q



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Fascinating findings

A significant amount of financial resources are poured into marketing research every year by organizations. Unfortunately, some of the best research studies don't garner nearly as much attention as the results merit. On the flip side, some research studies that don't uncover anything earth-shattering receive a tremendous amount of media and industry attention.

Research studies that are the most successful in moving the needle are the cases where the research firm uses a scientific and credible methodology, poses the right questions, and provides the publicity team with the content needed to produce a big bang. A detailed and aggressive public relations campaign to evangelize the results is essential.

When market researchers and public relations experts work together, they can produce a successful media campaign. The market researcher's ability to quantify trends and assess the big picture in conjunction with the public relations team provides the most appealing news hook for media release. From there, the news must be packaged and distributed to the right journalist, at the right publication and at the right time in order to trigger the media explosion.

What can happen when solid market research meets clever public relations? A results-driven media frenzy that produces over a billion audience impressions.

Pursuant Inc., a research firm, and Sage Communications, a marketing communications firm, both based in the Washington, D.C. area, each used their particular expertise to produce a tremendously successful media campaign on Fox's *American Idol*. The purpose of the campaign was to do a case study for clients on how effective joint market research and public relations efforts can be if all the ingredients to success are present. The result was over a billion audience impressions, a number that even amazed

the authors of the experiment.

News hook

To create our case study, we followed the first rule of public relations: identify the news hook. If it's not new, controversial, bold or attention-grabbing, journalists will not be interested. Nor will they be

Using market research and public relations to trigger a media explosion



By Melissa Marcello and Julie Litzenberger

Editor's note: Melissa Marcello is founder of Pursuant Inc., a Washington, D.C. research firm. She can be reached at mmarcello@pursuantresearch.com. Julie Litzenberger leads the public relations division at Sage Communications, a Vienna, Va. marketing communications agency. She can be reached at juliel@aboutsage.com.

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interested if the story doesn't provide an opportunity to showcase a new thought or angle that they can claim as their own. And if it's not packaged and given to them in the right format, the media will quickly discard it. However, one thing that journalists will almost always cover is relevant and quantifiable trends.

That said, we identified a topic that would hook the media instantly. *American Idol* had reached an all-time peak in spring 2006, garnering as many as 37 million viewers for a single episode. Despite the sizeable audience – composed of people from different demographics, from tweens to senior citizens – no third party had conducted a research study to gain more insight into who the viewers actually are and their motivations for voting for *American Idol* contestants.

After determining that an *American Idol* study could fill a hole in research-based coverage of the show in the popular press, we then applied the first rule of survey research: asking the right questions using a randomly sampled scientific survey representative of the entire population.

By asking different types of questions, we ensured there would be numerous angles we could pitch using the data – no matter what results our survey returned. For example, assuming that the number of viewers the show drew was accurate, we assessed not only how many adults actually watched the show but also how many voted during that particular season. It turned out that

one in 10 adults in the general U.S. population voted during the 2006 *American Idol* season. In addition, we pitted the judges against each other by asking respondents which judge's opinion they trust the most. The gossip columnists of *Us* and other outlets hyped the fact that Simon Cowell's opinion was valued more than twice that of Randy Jackson and nine times more than that of Paula Abdul. We incorporated the political Beltway angle by asking people if they thought their votes for *American Idol* count as much or more than their votes in the U.S. presidential election. It turned out 35 percent do believe a vote for *American Idol* holds more weight.

A solid research study provided the public relations team with a marketing tool capable of drawing a lot of media attention. By assessing the news value, announcing the content first to reporters under embargo, and identifying and targeting the right reporters, the story took on a life of its own. *Good Morning America*, CNN, MTV News and MSNBC, in addition to a number of the top daily newspapers around the country, covered it. The real kicker was when Simon Cowell – live on *American Idol* – boasted that his opinion was worth more than the other judges' opinions. His bragging was prompted and clearly scripted by the host, Ryan Seacrest.

Concrete tool

Research studies provide a concrete, scientific tool for gauging public opinion and presenting the public

perspective on a topic. Media professionals, who are constantly searching for "news" to feed the public's appetite for information (and their own demands for content), appreciate having something new to report. They know that people are naturally curious about how their own views are similar to, or different from, others across the country.

Reporters like to use results of public opinion polls as they help them avoid making unfounded generalizations about the public, its preferences or attitudes. This coverage is quite different from the "man on the street" interview, because the results are scientifically obtained and can be generalized to the entire population from which the sample is drawn. They're not just the opinions of a few people they happened to talk to that day.

In the *American Idol* study, the results were general enough to meet the demand for media material that would be popular with the public, but also included information that would be salient to more specialized audiences, such as viewers of political talk shows and "inside the Beltway" types.

Garner coverage

The widespread popularity of *American Idol* and its ability to garner media coverage on a regular basis were key factors in choosing the topic. Prior to Pursuant Inc.'s survey, there was not a single, nationally representative survey of U.S. adults that provided insight into who is voting for contestants on the show

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or their motivations for voting. There was speculation, mind you, but nothing scientific.

However, the same principles of market research and public relations can be applied to any industry. The key is to look for the “hook” of something that has not been covered in the past, is top-of-mind for people in the industry and will deliver the type of data that will automatically gain attention if provided to the right outlets. For example, if you are a technology company focused on the federal market, you may consider developing a survey surrounding presidential mandates and their impact on buying trends from federal agencies. Will it hit the *New York Times*? Not likely. But it will hit most of the federal and technology publications that are relevant to your customers. And reaching your customers will open doors and impact the bottom line, which is what market research, public relations or any other communication vehicle is all about.

The topic and question selection should be targeted to the types of media outlets desired for coverage and the core competencies of the organization that is sponsoring the survey. For example, a survey on *American Idol* would not make sense for the American Medical Association, but a survey asking mothers about the frequency with which they take their children to the doctor and their perceptions of the quality of care they receive would make sense. The topic and/or questions should be fresh and offer a deeper understanding of a social, political or economic phenomenon. A good keyword search online and in Lexis-Nexis should be conducted to ensure that the survey is going to uncover something new, and thus newsworthy.

In the case of the *American Idol* study, a range of topics provided news outlets with different angles. The Associated Press story, which made up the bulk of the coverage for at least 10 of the stories pub-

lished, focused on two key statistical findings. One statistic, reporting that one in 10 people voted in *American Idol* during the 2006 season, was believed to be staggering by many. It demonstrated that rather than sitting home as passive viewers, many adults were highly engaged in the show and voting. It contradicted what many had speculated: only tweens and teens vote in the show. Another statistic, which was reported by several general media outlets and gossip columns, reported that 58 percent of *American Idol* viewers value Simon Cowell’s opinion more than the other judges’ opinions. In addition, a question that asked the public to compare their *American Idol* vote with their vote in the presidential election offered a political angle for the talking heads.

Accurate and credible

Fielding accurate and credible quantitative research requires a nationally representative sample of the population that is randomly selected.



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Convenience samples, which could describe many of the online panels currently available, are not considered acceptable by most major media outlets presenting statistics in their coverage. We have been quite surprised in recent years by the many questions we have received from reporters about survey methodology. A number of reporters have asked for detailed methodological write-ups prior to providing coverage on our surveys.

In the case of the *American Idol* study, Pursuant fielded six questions on Opinion Research Corporation's CARAVAN national omnibus survey to find out more about who, among adults 18 or older living in the U.S., watched and voted in the 2006 season of *American Idol*. The survey was conducted by telephone from April 21-24, 2006, among a randomly selected national sample of 1,045 adults comprised of 515 men and 530 women. With a total sample size of more than 1,000, one can say with 95 percent certainty that the results are accurate to within +/-3.0 percent, which exceeds acceptable standards for a media release survey. While the margin of error for the entire sample was +/-3 percent, it is important to note that it was larger for subgroups.

Care should be taken to design

survey questions that are both valid and reliable. That is, the questions are measuring what one is intending to measure and the questions mean the same thing to all of the people taking the survey. Leading or "soft-ball" questions should be avoided. Savvy reporters will challenge findings that are questionable, overly self-serving, or simply do not meet their journalistic standards.

Work closely

The public relations and research teams need to work closely together throughout the entire process to ensure a media success. During question development, it is imperative that the questions have the potential to generate a newsworthy response, no matter what that data determines. For example, in the *American Idol* study, we knew that the question on which judge's opinion was valued most would create a media stir, no matter who was deemed the winner, because of the inherent relationship between the judges and nature of the show. The question would automatically trigger gossip and controversy - which are irresistible to reporters. Other newsworthy data, including anything that is new, challenging, surprising or is a popular topic, often results in a slam dunk. The questions need to present

several different angles to ensure that there is plenty of meat to give reporters and multiple people with various beats at the same publication.

Secondly, the public relations team needs to develop a very accurate and comprehensive media list. Our *American Idol* target list contained more than 350 reporters, producers, editors, bloggers and other influencers. Each of these reporters were hand-picked based on their beat. We knew these reporters were the exact people who would be interested in covering the story. Next, we developed a strong press release and several media angles to make our target reporters' lives as easy as possible. We also gave it to reporters under embargo (i.e., in advance under the promise that they won't break the story before we ask them to) to give them plenty of time to write the article before it went live. By packaging the news in the right manner, it increases the window for coverage tremendously.

After putting out the press release on a credible news wire, such as Business Wire or PR Newswire, it's imperative to hit the phones and pitch the story live. Reporters receive an incredible amount of e-mail, so personally calling them is often the only way to break through the clutter. Once on the phone with a reporter, you have about 20 seconds to pitch your case - so be ready with talking points in hand! And never forget the "what's in it for me" factor with reporters - cut to the chase on why it's an interesting story for their readers.

Tremendous potential

A research study is only as good as the awareness level it garners and its ability to alter current or false perceptions. A public relations campaign is only as good as the content it delivers - without the right subject matter and credibility, the media interest dies quickly. However, when the market research and public relations disciplines meet, there is tremendous potential to trigger the next media explosion. | Q

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Have a plan going in

Recently, I was involved in a project consisting of many moving parts. I say moving parts because just when you think you have all the bases covered, something comes up that wasn't considered.

First, some particulars associated with the project. It consisted of multimodal data collection including mail, telephone, focus groups and the Internet. To add to the complexity, the study included multiple languages and a host of cross-cultural aspects, spanning North America, Europe and South America.

Three phases were planned: setup, collection and analysis. Simple, right? Not so.

When beginning a project of this magnitude there are many considerations, which this article will attempt to examine. It should be noted however, that all projects, especially those that are complex, will contain additional considerations beyond what is covered here.

Process flow chart

At the outset of the study, there should be a project meeting involving a person at every touchpoint of the project. This is to ensure everyone will be on the same page. From this meeting, clear expectations should be conveyed and discussed. This is the point at which a process flow chart should be created and distributed to each member of the project team.

The process flow chart should include not only tasks but the order of tasks, the associated expectations and the person/persons responsible. This should be one of the guiding documents. Don't be afraid to use lots of visual elements such as boxes and graphs. But many people relate better to a written document so remember to strike a balance between graphic elements and text.

Another very important aspect of a successful study is to have a contingency plan. Not everything will go as it should. In the event of a breakdown, you should have a Plan B to move to. This should be well understood by all on the team.

If there are any changes to the process, be sure to include a process change form to instruct all involved of the change. Too often I have seen studies fail due to a link in the chain not getting the relevant

Your project will move more smoothly with a little preparation



By Art Jackson

Editor's note: Art Jackson is survey measurement manager for Boston consulting firm Novations Group Inc. He can be reached at 801-354-7612 or at ajackson@novations.com.



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information.

Clear understanding

Have a clear understanding of your hypothesis. In many cases this will include the types of analysis you will run on your data. If you are looking to run factor analysis, cluster analysis, etc., it's important you design your survey instrument correctly. There is nothing worse than getting to the end of collection just to discover your data was only nominal or categorical.

An example will help point this important issue out. Early in my career I was involved in a study that was to use simple regression analysis. However, due to some misunderstanding, it was later discovered that a dependent variable was never introduced in the survey instrument. Therefore, this type of analysis was not run due to lack of data.

Who is the respondent?

Another topic of consideration with a survey research project is who will be the respondent and what form of data collection is best in targeting that sample population. Oftentimes, clients jump to the Internet for its speed of collection and low cost. However, three things to consider here are: proper sampling methodology, validity and reliability. Not small issues.

Many individuals within our target

population may not have access to the Internet, thereby biasing our sampling methodology. Additionally, even if you do have near-complete coverage, are you sure the "proper" respondent completed the survey? I have consulted on many a project where, through a validation process, we were able to determine that a friend, sibling, spouse, coworker, secretary, child, etc., completed the survey rather than the intended respondent. You do not want to base decisions on a survey that was not properly validated with respect to the intended respondents.

If a blended methodology is to be used, give thought to the various biases associated with blending each mode of collection. Often a particular demographic might weigh in heavily on one type of collection methodology, thereby biasing results of your survey.

A brief example: We ran a study involving various automobile owners who were to rate many automobile manufacturers. It was discovered that those with higher-end automobiles chose to complete the survey using the Web, while those with lower-end automobiles selected an alternative mode of completing the survey. Consequently, the data reflected this difference. Of course, the reflection in the data was a result of the demo-

graphic of the individual who drove a particular type of car.

Another very important factor is lack of cross-strength. What I mean here is the strengths associated with one method of collection can actually create bias in another. For instance, a strength of Web collection is the ability to involve visual elements - something you can't do with a phone survey. Yet with a phone survey, you can clarify responses and probe a qualitative open-end.

Again, an example: A client felt that conjoint (phone- and Web-based) would be a great way of mapping the preferences of a particular product. Despite objections, the project went forward to the data collection phase. When it came to questions about color preferences, there was a statistical difference between those who took the survey by Web versus phone. On the Web, the respondent saw the colors, while the respondent who completed a survey by phone merely heard the names of the colors.

Short is best

When designing the survey instrument, there are many things to consider before collecting the data. Short is always best. "The shortest questionnaire needed to answer the research questions" should be the mantra.

The types of scales should be considered when designing the instrument. It's important to include all that are needed but not too many different types of questions. This can become confusing to the respondent.

Another tip: use clear, simple language. I was involved in a study that was written for a particular target population. After collection, the client wanted to introduce the same instrument to a closely related group of individuals. However, the first group had a higher degree of education than the second group. The survey was written for the first group. The client wanted to "save money" and not rewrite the survey. As a result, the second group of individuals didn't fully understand the questions and two things happened: non-responses

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increased and the data of those who did respond was weak at best.

Two other major considerations: validity and reliability. In other words, am I getting the data expected to answer my hypothesis, and, if I were to repeat this study, would I get the same results? There are many books that address each of these specifically. I would recommend understanding the various levels of validity before conducting a study.

Finally, TEST, TEST, TEST. It's better to be slow and right than fast and wrong. Test the survey, test the process, test the collection, then dump the data and test the analysis. Ask yourself through the entire process: Did I answer the questions posed in our hypothesis?

Next are multicultural/language considerations. With these topics you might think I'm only speaking of other countries but I'm not. Short story: I'm from the West. When grocery shopping while on vacation, I was asked if I wanted a poke with my grocery item. I tried not to look

shocked but I must not have been too convincing as the clerk felt inclined to explain she meant a paper bag. This experience shows that there are many language and cultural differences just within our country. Imagine how problematic it could be if you are doing a study in a foreign country in a different language.

Consider that languages often have strong regional differences. When translating the survey, be sure to translate it to something that will be understood by as many respondents as possible. In addition, attempt to use a translator who is from the particular region you are targeting. Also, take into account cultural difference when collecting data. Some things may be appropriate in one area while inappropriate in another. What can create richness in data can also cause erroneous data if left unchecked.

Begin the analysis

Once data collection has been completed, the next step is to begin the analysis. When I began my career, I

was under the impression that analysis was quick. I have learned since that it takes time and plenty of it.

Like everything described in this article, there should be a process to the analytics. By no means is there only one way of doing it. Find what works best for you.

There are many very good programs for analysis. I personally like SPSS. It is both robust and popular. But again, use what you like.

Finally, data is only as good as the interpretation and presentation of actionable items. More likely than not, you need to be concise in what you present. Decision makers want to know the highlights. This generally means an executive summary with bullet points followed by detailed findings and any supporting documents/references.

Here again, practice. Know your data and how it addresses your hypothesis. Practice the delivery, practice the presentation, practice possible Q&As. Above all, PRACTICE. | Q

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Survey Monitor

continued from page 10

speed of responses was confirmed, with 45 percent of responses arriving within half an hour of sending out the survey. Within 24 hours 85 percent of all respondents had taken part in the survey.

A few days after the survey was carried out, all participants were asked their opinion and nearly all (97 percent) said they enjoyed taking part; 98 percent of all who completed the survey said they would do it again. Even 65 percent of those who dropped out of the mobile survey said they would try to take part the next time. The main two reasons people didn't complete the survey were because of technical problems (50 percent) and concerns about the cost of participating (13 percent).

Mobile surveys are still relatively new to people, which may be why heavy users and those with monthly contracts were seen to be more likely to take part than customers using pre-paid mobile phones.

"From online market research we know that new technology can be used to overcome some of the issues of traditional research, but only if it is done properly and to high quality standards," says David Day, CEO of Lightspeed Research. "To ensure this,

we are conducting further in-depth mobile survey research before deciding if using mobile research should become part of our offering in the future. The results partly confirm our expectations that there could be significant benefits in using this approach for key target markets. However, some of the questions raised need to be considered honestly and thoroughly to ensure high-quality results."

Lightspeed Research conducted the initial and final online survey amongst 2,550 people in the U.K. There were 1,007 participants in the mobile survey. For more information visit www.lightspeedresearch.com.

Customer service: a cure for commoditization?

Could an idea as old and familiar as good customer service really be the next killer app for business? You bet, says a report on a new research study from Katzenbach Partners LLC, a New York management consulting firm.

According to the report, because the market for many goods and services has become increasingly commoditized, overcrowded and price-conscious, customer service has become critically important as a potential source of strategic differen-

tiation and profits. The challenge for most companies, however, is that they have an incomplete understanding of what constitutes good customer service and, as a consequence, their interactions with customers often leave a lot to be desired.

The report - *The Empathy Engine: Turning Customer Service into a Sustainable Advantage* - is based on interviews Katzenbach Partners conducted with customer service executives from companies across a range of industries - companies viewed as leaders in providing customer service - as well as on a telephone survey of more than 1,000 American consumers.

"What we confirmed by talking with some of the best is that great customer service can't be delivered through simple algorithms, like scripted call center responses. Instead, it takes a broader, more empathetic response: a sustained effort by every employee to think about how what they do ultimately impacts the customer's experience," says Katzenbach Partners' Traci Entel, one of the report's authors.

According to the report, some widely-accepted customer service best practices actually undermine the customer experience:

- Believing that the customer always comes first. Instead, managers should focus on putting their front-line employees first, so that they, in turn, have the resources and freedom they need to care for customers.

- Basing call-center service on scripted responses. Scripts, according to the report, do more harm than good because they reduce the front-line worker's flexibility in responding to customer problems and requests. Frontline employees need the flexibility - and resources - to resolve customer requests as effectively as possible.

- Thinking about customer service as strictly a cost center. Instead, companies should look at customer service as a potential wellspring of innovative thinking and profits.

- Relegating customer service to organizational silos. Companies should instead place the responsibility

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for customer service on the company as a whole, involving not only the frontline workers but managers and senior executives.

• Believing that “Wow!” experiences are the best measure of customer service quality. Relying on one-off incidents of special treatment as the tool for building customer service is bound to fail, according to the report. Instead, companies should focus on delivering sustained, high-quality outcomes with a customer every time.

The report cites data from a Katzenbach Partners telephone survey of more than 1,000 consumers that indicates that virtually all American shoppers (94 percent) believe customer service is an important factor in where they shop – a number almost identical with the 95 percent who say price is an important factor.

Moreover, according to the survey, more than three out of five (62 percent) consumers say they will not make future purchases from stores (or other service providers) where they feel they have had a bad customer service experience.

“Our consumer survey data provide pretty clear evidence that companies that don’t succeed at providing consistently high-quality service to their customers are going to pay a heavy price in the future,” says Entel.

According to the report, companies wanting to improve their delivery of customer service need to become “empathy engines” in which not only frontline employees but also managers and senior leaders work together to collectively stand in their customers’ shoes in order to better understand and address customer needs.

“We’ve introduced the term empathy engine to capture a way of thinking about and organizing a company so that it can, as an institution, put empathy into action vis-à-vis its customers,” says Entel.

Rather than thinking about customer service as a single interaction with the customer, the empathy engine takes a holistic approach to customer service. According to the

report, these companies strive to:

- understand and resolve customers’ problems at minimum cost to customers;
- create a company-wide culture of empathy;
- empathize with and give decision-making power to their frontline employees, so they can focus on generating excellent customer service;
- sustain a service ethos through the company through storytelling;
- view the front line as a hotbed for innovative customer service;
- view customer service as a profit-generating activity and important contributor to shareholder value, rather than “just a cost center.”

“Becoming an empathy engine requires a major commitment from the entire organization to see the world from the customer’s perspective and to act accordingly to deliver a consistent, high-quality customer experience. But in our experience, the benefits – in terms of increased customer loyalty and business, and enhanced employee satisfaction – are well worth the costs of getting there,” says Sarah Grayson, a Katzenbach Partners consultant. For more information visit www.katzenbach.com.

Americans wowed by wireless devices

Various new and emerging wireless applications have caught the attention of American consumers, according to research conducted by Ipsos Insight, New York. However, many consumers will seriously consider these emerging wireless applications only if they are compelling enough to break through device and communications overload. Ipsos Insight surveyed over 1,000 online adults on their awareness, use and interest regarding a range of specific wireless device-application combinations, focusing primarily on notebook PCs and mobile phones. By design, these wireless device-application combinations emphasized newer and emerging features and options.

Respondents were asked whether they had used each of the applications in the last 30 days, and whether they would seriously consider using each in the future. Their future consideration was spread fairly broadly across Web connectivity, communications and content applications and across the PC and mobile device platforms.

Neither the PC nor the mobile phone dominated consideration of these emerging wireless applications. The most popular options were Wi-

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Fi Web surfing on a notebook PC and e-mailing or instant-messaging on a mobile phone. Also, while future consideration was higher than past-30-day use for all of these fairly new or emerging applications, untapped interest was particularly high for GPS applications on mobile devices.

“The range of wireless options being considered suggests sustained interest in multiple devices that connect to the Web, and potentially to each other,” says Todd Board, Ipsos Insight senior vice president. “The notion of many consumers flocking to just one converged device is receding steadily, in part due to the ongoing device explosion. More and more it appears that Web connectivity and interoperability of specialized devices is what’s attractive. That said, experimentation around sweet-spot or all-in-one feature combinations – like Apple’s iPhone – will continue. And of course, we’ll continue to find distinct segments of consumers who vary in terms of application and plat-

form preferences and combinations.”

Respondents were also asked what they see as barriers to considering specific wireless device-application combinations for which they reported low consideration. The barriers generally clustered around “overload” and lack of perceived need/desire for the application, concerns about costs (both direct and indirect) and uncertainty about whether the benefits would be worth the learning or behavior change involved.

“Tech marketers can choose to view this as good news, bad news, or possibly both,” Board says. “Regardless of the specific technology application, we tend to see these barriers time and time again. There is some sequencing involved – only if I perceive enough of a tangible need or benefit do I bother to learn about the costs involved in acquiring that benefit. Likewise, only if I’ve explored the explicit costs will I bother to assess whether there are any hidden or hassle costs I need to

factor into my thinking.

“What is heartening is the relative absence of what we call performance uncertainty barriers or concerns. These are when individual consumers are interested enough in a technology application to take a serious look at it but question whether it will really perform as advertised. While it will always be tricky to bridge complex technology and mainstream consumer expectations, there seems to be relatively little abject consumer skepticism about these applications.”

These national survey research data were collected between November 16 and November 20, 2006 with sample drawn from the Ipsos U.S. Online Panel. Data are based on 1,120 online surveys among a representative sample of U.S. online adults. The survey results can be said to be within ± 2.9 percentage points of what they would have been had the entire U.S. online population been surveyed. For more information visit www.ipsosinsight.com.

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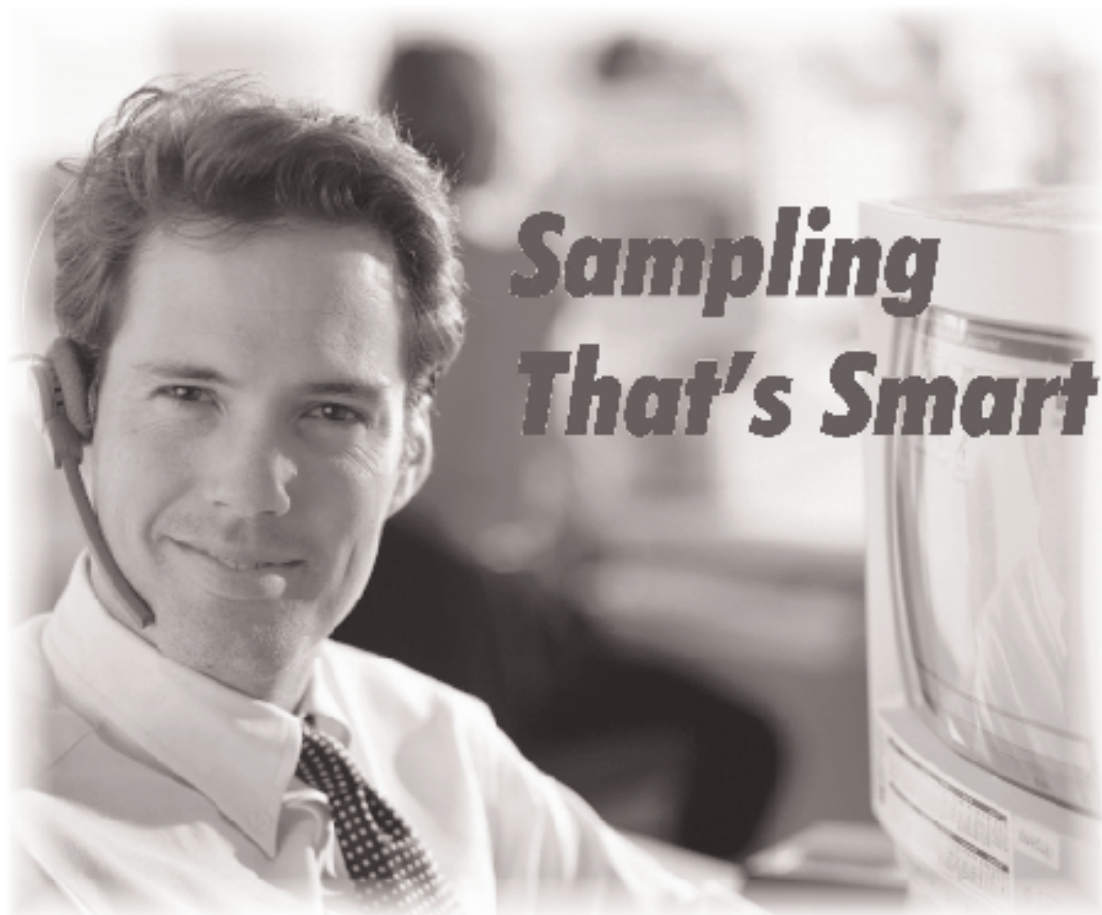
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Product and Service Update

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works in conjunction with the Mintel Global New Products Database (GNPD) to allow CPG companies to monitor the sales successes and failures of new products and established brands.

GNPD IRIS is designed to help companies identify emerging trends and make choices in product innovation by monitoring the successes and failures of their competitors.

GNPD IRIS integrates the existing Mintel GNPD tool with IRI InfoScan, a scanner-based tracking service that processes point-of-sale data from stores on a weekly basis across seven countries. Data is provided for major channels of distribution in France, Germany, Italy, Netherlands, Spain, United Kingdom and the United States. GNPD IRIS is an extension of GNPD and subscriptions are available from Mintel. For more information visit www.mintel.com or <http://us.infores.com>.

EZReport 2007 from Raosoft

Seattle-based Raosoft's EZReport Version 2007 is designed to provide analysis and reports with presentation-quality for both non-expert and expert end users. EZReport was developed specifically to examine questionnaire and survey-type data. The data can be drawn from Raosoft data collection software, any DBF database, ASCII databases or standard ODBC databases (SQL Server, Access, Oracle, DB/2, Sybase and more).

New features include new analysis of comments and their handling in reports, plus new capacity for report generation. Automation options let multiple reports be quickly prepared in segmented detail. As well, formatting for charts is improved to provide more informative and clearer displays for reports.

Other new features/capabilities include:

- Automated multi-page reports with comments combined with numerical analysis are possible to

generate in one step.

- Query and crosstabulation options are available with the automated comments, for detailed reports by segmented categories, in automated fashion.

- Comment metrics allow users to examine the number of responses or unique word counts for qualitative analysis.

- The extended command-line interface provides for multiple query support to let users e-mail detailed reports automatically to the correct persons.

- Users can access and analyze Web-based survey data gathered with EZSurvey for custom and default reporting on a local desktop computer.

- Instant dynamic report generation. Modules of EZSurvey form a plug-in that produces reports of current online data in PDF format automatically. A CGI script returns the Web data in a format that EZReport uses to dynamically update the report file. Then, reports in PDF format are possible automatically. Users may have instant dynamic report generation when current data is added to the EZReport database, for ongoing reports. For more information visit www.raosoft.com.

Briefly

Networking and software firm Tekniq Data Corporation, Overland Park, Kan., has launched Wonder Survey, an online survey application at www.wondersurvey.com. Features include customized appearance, personalized invitations and an incentive program.

Dubai-based Maktoob Research has launched the TravelMonitor, an online panel focusing on travel in the United Arab Emirates and Saudi Arabia. Topics researched include the influence of brand when choosing an airline, a tour operator and travel agency; brand awareness of airlines, tour operators and travel agencies; positioning of airlines, tour operators and travel agencies; brand visibility; and brand personality. For more

information contact Tamara Deprez at tamara@maktoob-research.com or visit www.maktoob-research.com.

Lightspeed Research, Basking Ridge, N.J., has launched the ELITEOpinion Panel at www.eliteopinion.com. The business-to-business panel is an online community for business professionals and is comprised of purchase influencers in various industries, including telecommunications, finance, insurance, corporate travel and IT/technology. For more information visit www.lightspeedresearch.com.

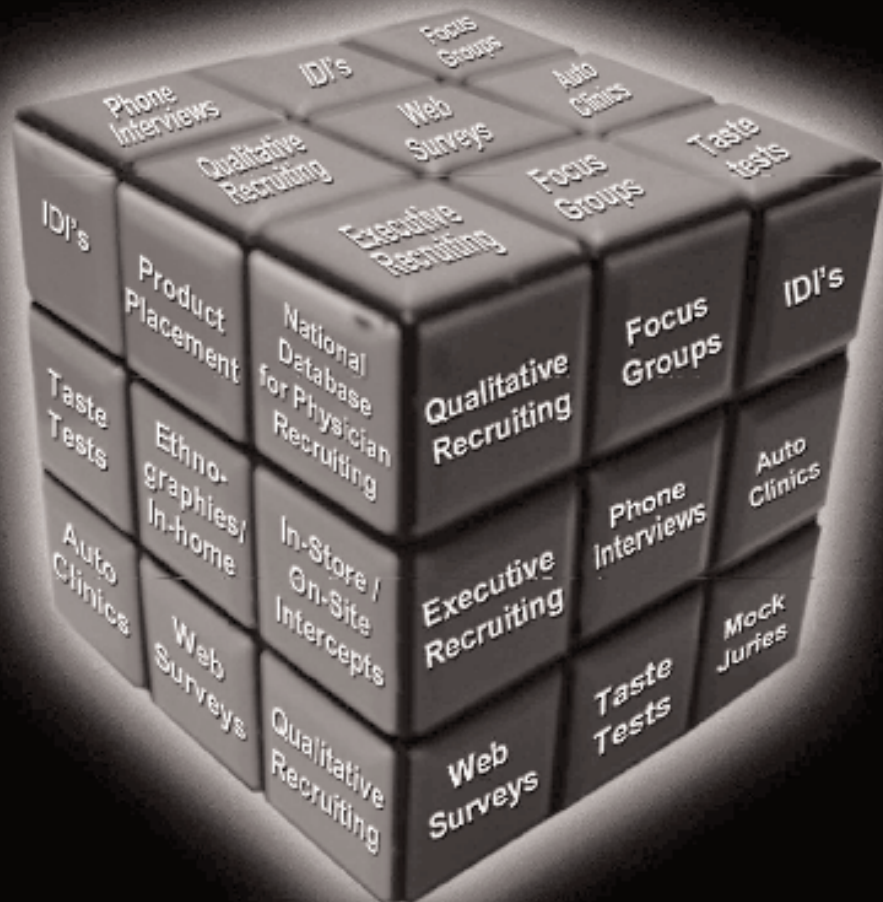
Harris Interactive, Rochester, N.Y., has launched the Web portal www.iautocentral.com to provide the global automotive industry free access to more than 10,000 Tier 1-2-3 supplier Web sites.

Research firm Murray Hill Center West has moved to 6080 Center Dr., Los Angeles, Calif., 90045. Phone 310-392-7337. The new facility features large respondent rooms and tiered viewing rooms. It is located in the Howard Hughes Center 10 minutes from the Los Angeles airport.

USA/Direct Inc., Sparta, N.J., is now offering a national health care provider online omnibus developed to facilitate smaller projects and urgent informational needs targeted at medical, dental and pharmaceutical professionals. Clients select the timing, the audience, the sample size and survey length. For more information contact Guy Parker at 973-726-8700 or visit www.usadirect-inc.com.

A new research firm, B-More Informed, has opened in Baltimore. Its offices include a focus group facility. The company also offers moderating services, online focus groups, field management and store intercepts/exit interviews. For more information contact Sandy Tomak at 410-244-1400 or visit www.b-moreinformed.com.

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Research Industry News

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are codeveloping a series of multi-mode data collection methodologies designed to expand the applicability of Internet research to a wider range of projects.

Association/organization news

The Professional Researcher Certification (PRC) program established by the Marketing Research Association has staggered the closing of the grandfathering period, which was originally set to end on February 28, 2007. The move came as a result of the large influx of PRC applications in the last quarter of 2006. Grandfathering will now close in phases in order to allow for processing, extending selected segments as listed below (Phase I closed February 28):

Phase II (closing March 31, 2007)

Segments - data collection: focus facility, telephone; research company: field

Phase III (closing April 30, 2007)

Segments - data collection: qualitative; research company: operations, projects

Phase IV (closing May 31, 2007)

Segments - data collection: owner/CEO; research company: owner/CEO; end user: all job categories

Phase V (closing July 31, 2007)

Related services: all groups; research adjunct

“The phasing of the grandfathering reflects the initial intent of the developers of the Certification program: to be organic, dynamic, current and relevant,” said PRC Workgroup Chair Joan Burns. “The program has evolved even during its initial two years. Job segments have been added and redefined as the profession grows in scope and complexity in tandem with tech-

nology.”

The Qualitative Research

Consultants Association has issued a call for papers for its annual conference in Vancouver on October 24-26. The deadline for submissions is March 30. For more information e-mail conferenceproposals@qrca.org or visit www.qrca.org.

New accounts/projects

Schaumburg, Ill.-based **ACNielsen** has expanded and broadened its partnership with **Dollar General**. Under terms of the new five-year agreement, ACNielsen will provide account-level services for Dollar General including a census-level trade area which will be made available to the vendor community.

In addition, ACNielsen and Dollar General will create a custom-defined template for use in Dollar General's category management process. As part of the agree-

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ment, Dollar General will accept only ACNielsen data when completing these templates, which will include ACNielsen trade area information as well as Homescan Consumer Panel insights. Additional products and services, as well as on-site personnel, will be included as part of the new partnership.

Atlanta-based research firm **Infosurv Inc.** has selected **Dexterity**, an India-based knowledge process outsourcing firm, to provide offshore full-cycle support in scripting, processing/analysis and reporting.

Radio One, a radio broadcasting company that primarily targets African-American and urban listeners, has agreed to encode its radio stations in Philadelphia and Los Angeles for the **Arbitron Portable People Meter** audience measurement services. The Portable People Meter system, began collecting audience estimates in Philadelphia on January 11, 2007 and is slated to begin collecting in Los Angeles in January 2008. **WQXR-FM**, the New York

classical music radio station owned by the New York Times Company, has entered into a multi-year agreement for Arbitron's radio ratings services that include Portable People Meter audience measurement services when deployed in New York. Separately, Boston classical radio station **WCRB-FM** has entered into a multi-year agreement for Arbitron's radio ratings services that include Portable People Meter audience measurement services when deployed in Boston.

Opinion Research Corporation, Princeton, N.J., will become **CNN's** new polling partner as the network moves toward the 2008 elections. Beginning in 2007, polls released by the network will be identified as **CNN/Opinion Research Corporation** surveys.

The Direct Marketing Association has selected Vancouver-based research firm **Vision Critical's** online panel management solution, Panel+, for its DM Research Forum panel. The panel asks members to partic-

ipate in monthly Web surveys and interactive discussions on direct marketing topics like e-marketing techniques, lead generation, database segmentation and customer retention.

New companies/new divisions/ relocations/ expansions

Sarasota, Fla.-based retail resources firm **National In-Store** has launched its RetailMetrics division, which provides inspection, measurement and score-carding services to help retailers achieve a consistent in-store experience.

San Francisco-based **AbsolutData Research & Analytics** has opened an additional facility in New Delhi.

Dallas-based **Common Knowledge Research Services** has opened a new office in Charlotte, N.C. The office is headed by Business Development Director Bruce Ritch, who relocated from Common Knowledge's Fairfield, Conn., office.

ACNielsen has established an industry practice group for leisure and travel research in China, to be headed by Grace Pan.

Company earnings reports

Boston-based **Kadence** announced a doubling in sales over the past 12 months. End-of-year results for 2006 show that the company serviced \$8 million worth of business in 2006, compared to \$4 million in 2005.

The board of U.K.-based **Research Now** announce its final results for the year to October 31, 2006. Sales nearly tripled to £9.6m (2005: £3.6m). Profit before tax more than trebled to £1.6m (2005: £0.5m). There was strong cash generation: net cash of £2.4m at year end (2005: net cash £1.4m).

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The 2007 Directory of Data Processing and Statistical Analysis was compiled by sending listing forms to firms we identified as providers of data processing and statistical analysis services. This year's directory lists over 250 firms, arranged alphabetically. In addition to the company's vital information, we've included the types of data processing services they provide (coding, data entry, data tabulation, scanning services and statistical analysis). A cross-reference of these services is also offered for your convenience.

The Directory of Data Processing and Statistical Analysis begins on page 78.

The cross-reference of data processing services begins on page 98.

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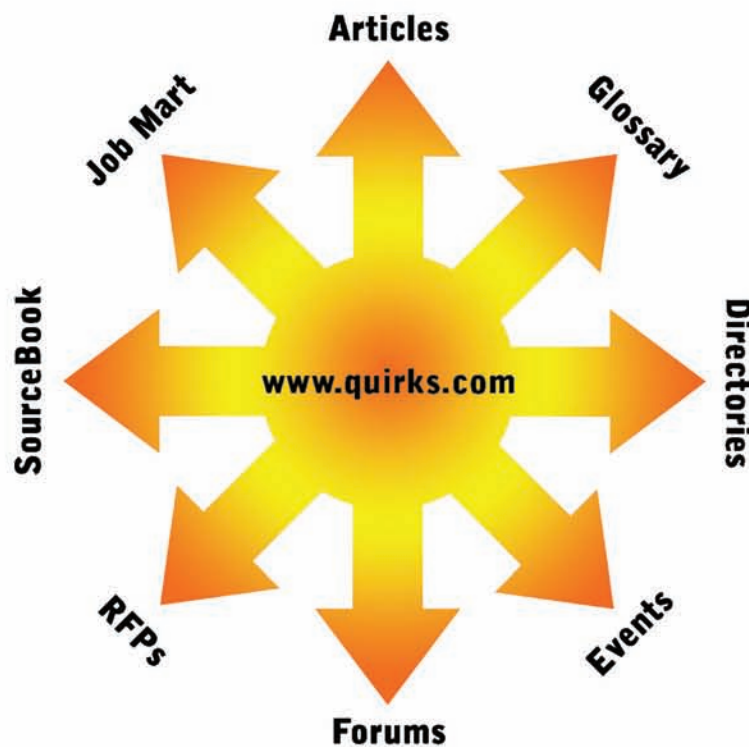
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Trade Talk

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the questions are geared toward what we think they want.”

- “Drive behavior change and action.”
- “Be used by management to provide support in areas identified in surveys that could improve customer perceptions.”
- “Provide the required feedback for corrective actions.”
- “Really be taken serious. There is lots of truth within the answers, and customers are really willing to help and drive the change.”

Grouped by theme, the top five “I wish surveys would” sentiments expressed through the open-end were:

- have more of an effect/provide more actionable results and suggestions (27 responses);
- be more concise/specific and easy to complete (12);
- more accurately measure customer satisfaction (10);
- be offered more frequently and have a higher response rate (7);
- better show progress over time and provide better feedback on actions taken (5).

Hiding

As Strativity’s report points out, “The results expose the fact that companies are hiding behind customer surveys as proof that they are listening to their customers, but in reality are not properly using the information once they have it.”

“Today’s companies are betraying their customers by asking them questions with little readiness to act upon their responses,” said Lior Arussy, CEO of Strativity Group, in a company press release. “Our study reveals the drastic disconnect between customer expectations and the actions of companies. This failure to turn customer insights into actionable solutions will ultimately be detrimental to a company’s bottom line.”

Still, there is hope. Strativity closes its report with some sage words. “If you don’t intend to follow up and change in a meaningful way, do not conduct a survey... Turning insight into action is a powerful method to establish an authentic and loyal relationship with customers. To achieve that, customer surveys need to evolve into a strategic dialogue with full commitment to execution... (By doing so) companies will effect both change and differentiation that customers will notice and respond to in an extremely profitable way.” | Q

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Surveys generate useless information that doesn't fire the imagination

Talk about depressing findings. According to respondents to a survey conducted by New York research and consulting firm Strativity Group about the role and use of customer surveys within their organizations: the surveys don't lead to useful new ideas (and instead are only meant to validate current practices); results don't provide useful guidance and can't be linked to actions; getting internal buy-in is very difficult; and, once the results are in, the validity of the surveys is called into question.

These and other rays of sunshine are reported in "Discovering the Real Answers: Customer Surveys - The New Realities." Strativity fielded a Web-based questionnaire in the summer of 2006, garnering 217 responses from around the globe, with the majority coming from companies in North America. It included 10 questions, answerable with a 1-10 strongly disagree-strongly agree scale, plus one open-ended question.

Industries with the highest partic-

ipation were consulting and professional services, technology, telecommunications and manufacturing. Company sizes ranged from fewer than 100 employees to more than 10,000.

Nearly 42 percent of respondents said that their customer surveys are not designed with strategic intentions. To these respondents, surveys are being used to preserve the status quo, not drive change. Just over half (52.3 percent) strongly agreed with the statement "Our surveys are designed to validate our current performance."

Not surprisingly, only 50.2 percent agreed with the statement "Survey questions are designed to drive actions."

Over three-quarters (77 percent) of the participants said they find it difficult to get buy-in for change within their organization. And 71 percent of the participants stated that there was very little internal follow-up to change behavior in the organization.

Lot of pain

There's a lot of pain out there. Consider the plight of the poor souls who offered up the following responses to the open-ended question "I wish customer surveys would...":

- "Have more real-life/real business use and application in them, less trying to check out some cute theory that is not related to practical implementation."
- "Provide better insight into the things that our customers really value."
- "Be an accurate measure of customer satisfaction."
- "Be assessed at a deeper level by operations for improvement and change other than at the overall c-sat score level."
- "Be impactful and acted upon."
- "Be more timely and specific to situations and individuals. I also wish they would be more specific to the customer experience: ask what the customers really want. Currently

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