OCTOBER 2007

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Marketing Research Review

Customer satisfaction

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> Linking satisfaction data with business metrics

> Cell phone feedback system helps Budget satisfy drivers

Plus...

> A simple solution to segmentation problems

> Raising the profile of in-house research departments

> Software review: Vision Critical

2007 Customer Satisfaction Directory

Quirk's Marketing Research Review
Volume XXI Number 9

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in case you missed it...

news and notes on marketing and research

P&G finds it makes sense to target Latinas with scents

Based on research showing that its Hispanic consumers are eager to use scented products throughout their homes, Procter & Gamble formed its first multicultural partnership with Target, creating a "Touch of Scent For Every Room," as MediaPost reported.

P&G created special end caps displaying a number of scented P&G products for use in Target stores that serve larger numbers of Hispanics. The month-long promotion grew out of the success of Tide's Simple Pleasures line with Hispanic consumers, and the realization that they wanted even more scent options.

A P&G spokeswoman said the company worked with scent expert Alan Hirsch, who has previously developed nine aroma-based personalities for P&G's Hispanic research division.

The products in this promotion included Tide, Dawn, Febreze, Downy, Gain, Bounce, Cascade and Mr. Clean products, and fragrances included lavender, jasmine, roses, violets, lilies and cinnamon.

While P&G said there is no clear reason why Hispanic consumers are so much more enthusiastic about scents than other groups, there is no doubt that scent matters. "We have learned that while our Latina customer buys a slew of scent products for her home, the scent experience is intrinsically important in how she rates the detergent she uses," the spokeswoman said. "She is really motivated by freshness and goes out of her way to provide it. A fresh, new scent is something even the family will notice and appreciate."

The company has developed specially tailored versions of products such as Tide with Febreze Freshness and Downy Tropical Bloom "that include product and packaging attributes that meet the preferences of Hispanic consumers."

"P&G Seeks Scent-Sensitive Hispanics In Target Stores," MediaPost, June 22, 2007. Also see "How P&G Led Also-Ran to Sweet Smell of Success," *Wall Street Journal*, September 4, 2007.

Trend-tracking helps Jimmy Dean cook up breakfast success

As reported by MediaPost, food maker Sara Lee's aggressive focus on "disciplined innovation," driven by its new, multimillion-dollar research facility outside of Chicago, has helped put it on top of the shifting trends affecting the breakfast meats category.

The rapid growth of one- and two-adult households - up 21 percent and 17 percent, respectively, between 1995 and 2005, and now accounting for nearly 60 percent of all U.S. households - is driving a wider variety of single-serve and portion-controlled packages.

Quick preparation and portability represent by far the biggest growth opportunities. Regardless of family size, frozen sausage consumption is rising for products that allow users to readily consume just the amount needed, according to Chicago research firm Mintel.

Sara Lee's recent breakfast convenience innovation, Jimmy Dean Breakfast Bowls, neatly tie into all of these trends. These prepared medleys already include scrambled eggs or pancakes, take just three minutes in the microwave and eliminate dirty dishes.

Sales since their launch in July 2006 have exceeded expectations by more than 100 percent, forcing the company to increase production capacity to keep up with demand, said Tim Smith, senior brand manager for Jimmy Dean. The product has passed Sara Lee's core success metrics with flying colors, he said: It's creating new, incremental customers for the company and it's bringing incremental customers to the category for retailers.

"Quick-Prepare Breakfast Offerings Boosting Jimmy Dean's Performance," *MediaPost*, May 11, 2007

Selling the experience, not just the brand

As reported by *Financial Times* writer Jonathan Birchall, twice a week, 30 or more people gather at the Nike store in Portland, Ore., to go for an evening run. Afterward the members of the Niketown running club chat in the store over refreshments. Nike's staff tracks their performances and hails members who have logged more than 100 miles.

Meanwhile, at the Whole Foods supermarket in Seattle, shoppers attend a "singles" night the first Friday of every month. The store's marketing staff organizes a wine tasting or sets out snacks in a room used to stage cooking classes. Customers can opt to wear a red or blue ribbon to indicate whether they are looking for a male or a female partner.

Both events are examples of "experiential" branding – corporate efforts to make companies into more than just sellers of commodities. A host of consumer brands are creating similar communities, with retailers in particular augmenting events at their traditional stores with online efforts aimed at striking up a conversation with customers.

Nike is restructuring its entire branding operation because of the enormous response to two online initiatives it launched last year. More than 200,000 runners are using the Nike Plus site, which Nike set up last year after launching a running site that can communicate with Apple iPods. The site allows runners to upload and compare their performances, and more than half visit the site at least four times a week.

Nike's joga.com social-networking site, which was created in partnership with Google to run for eight weeks during the 2006 World Cup, was used by more than 1 million people to establish personalized World Cup pages.

Charlie Denson, president of the Nike brand, said the response to both projects helped persuade the company to divide its Nike brand operations into six categories - running, basketball, soccer, men's fitness, women's fitness and sports culture - with teams that would develop relationships with specific customer categories.

Joga.com, Denson said, was "a compelling platform," but it traditionally would not have been incorporated into a sustained effort to develop customer relationships. "When the World Cup was over, our brand teams who had built that whole platform moved on to the next thing. And I thought, 'Whoa, whoa, whoa, you just dropped the keys to the kingdom in the moat,'" he said.

In a similar vein, Procter & Gamble launched the Capessa site with Yahoo in January, an attempt to set up an online community "where women can share inspirational stories as well as practical tips and information relevant to the various aspects of their lives." But the site will also enable P&G to gain insights into the "interests and product needs" of women - providing the company its own version of Nike's running clubs.

"Just Do It, Marketers Say," *Financial Times*, April 30, 2007

Phone surveys skewed by cell-only homeowners

According to government statistics released in a recent Pew research study, 12.8 percent of U.S. households cannot now be reached by the typical telephone survey because they have only a cell phone and no landline telephone. Twenty years ago the survey research profession worried mostly about the roughly 7 percent of U.S. households that could not be interviewed because they had no telephone.

If people who can only be reached by cell phone were just like those with landlines, their absence from surveys would not create a problem for polling. But cell-only adults are very different.

The National Health Interview Survey found them to be much younger, more likely to be African-American or Hispanic, less likely to be married and less likely to be a homeowner than adults with landline telephones. These demographic characteristics are correlated with a wide range of social and political behaviors.

In early 2003, just 3.2 percent of households were cell-only. By the fall of 2004, pollsters and journalists were openly worrying about the potential bias that cell-only households might create for political surveys. The National Election Pool's exit poll found that 7.1 percent of those who voted on Election Day had only a cell phone, and these cell-only voters were somewhat more Democratic and liberal than those who said they had a landline telephone.

Given the speed with which the number of cell-only households has increased, there is growing concern within the polling business about how long the landline telephone survey will remain a viable data collection tool, at least by itself. At the annual meeting of the American Association for Public Opinion Research, a government researcher told the audience that the size of the cell-only group could approach 25 percent by the end of 2008 if the current rate of increase is sustained.

The Pew Research Center conducted four studies that included samples of cell phone numbers as well as landline numbers. The surveys covered a wide range of topics, including use of technology, media consumption, political and social attitudes and electoral engagement. Comparing the cell-only respondents with those reached on landlines allowed an assessment of the degree to which traditional surveys are biased by the absence of the cell-only respondents.

The good news, says the report, is that none of the measures would change by more than 2 percentage points when the cell-only respondents were blended into the landline sample and weighted according to U.S. Census parameters on basic demographic characteristics.

However, while the cell-only problem is currently not biasing polls based on the entire population, it may very well be damaging estimates for certain subgroups in which the use of only a cell phone is more common. According to the most recent government estimate, more than 25 percent of those under age 30 use only a cell phone. An analysis of young people ages 18-25 in one of the Pew polls found that the exclusion of the cell-only respondents resulted in significantly lower estimates of this age group's approval of alcohol consumption and marijuana use.

Comparisons Between Landline Samples and Cell-Only Samples

Number of survey questions compared	46
Average (mean) difference between landline and cell-only samples across all 46 questions	7.8%
Range of differences (absolute value)	0% - 29%
Maximum change in final survey estimate when cell-only sample is blended in	2%
Average (mean) change in final survey estimate when cell-only sample is blended in	0.7%

Source: Pew Research Center, June 2007

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names of note

Tom Danbury, retired co-founder of Fairfield, Conn.-based *Survey Sampling International* (SSI), died in his sleep on July 11 while visiting family in Kansas City, Mo. He was 71.
Danbury is credited with a number of innovations for the market research industry. He co-founded SSI, the first commercial sampling company, in 1977 with Beverly Weiman, who also retired earlier this year.
While under the direction of Danbury, SSI introduced commercially available RDD samples, SSI's sample screening service, "LITe" (low-incidence targeted) samples, and the SSI-SNAP online ordering system. Danbury also conceptualized and was instrumental in developing World-Opinion, a Web site dedicated to supporting the market research industry, in 1995. Memorial contributions may be made to the Carter Center (www.cartercenter.org) or Care (www.care.org). Online condolences can be made at www.mem.com.

The NPD Group Inc., a Port Washington, N.Y., research firm, has promoted **Martine Ringwald** to vice president, beauty tracking service; **Natalie Seidman** to vice president, financial services business development; **Julie Stewart** to vice president, custom research services; and **Karl Werner** to vice president, commercial technology.

U.K.-based *InterContinental Hotels Group* has named **Regina Lewis** vice president of consumer insights.

Randi Felton has been named senior director, ad sales research for *Hallmark Channel* and *Hallmark Movie Channel.*

Fieldwork, Chicago, has promoted **Kellie May** to director and named **Felicia Waters** and **Natalie Rettberg** project manager.

Cincinnati research firm *MarketVision* has named **Marsha Calloway-Campbell** and **Michelle Ogren** research director.


Campbell


Norman

Synovate announced that **Nicos Rossides**, CEO for Central/Eastern Europe and the Middle East (CEEME), left the company in September. **Kurt Thompson** has been appointed the new CEO for Synovate in CEEME. Separately, Synovate promoted **Mary Beth Lake** to MarketQuest CEO in Chicago. In India, Synovate announced three senior appointments for its Indian operation to be based in Mumbai: **Mulraj Gala** has joined as the new finance head; **Sanskrati Sail** has been named head of human resources; and **Pranay Dankedar** has rejoined Synovate as a senior project director in the quantitative research division. In London, **Michelle Norman** has been promoted to CEO of Synovate's U.K. business. Synovate has named **Andreas Zachariou** managing director of Synovate Gulf, with responsibility for the company's business in UAE, Iran, Kuwait, Qatar, Bahrain and Oman. In addition, Zachariou will serve as acting managing director for Saudi Arabia. He replaces **Andreas Gregoriou**, who has accepted a senior position on the client side.

Digital Research Inc., Kennebunk, Maine, announced that its senior research services staff has been certified by the Marketing Research Association's Professional Researcher Certification program. Those certified are: **Nicole Devine**, associate research director; **Stephanie Fraone**, senior research associate; **Meredith Gilfeather,** associate research director; **Kristine McNeil**, senior research associate; **Jane Mount,** vice president; **Karen Peterson**, research director; **Nancy Vogt**, senior research associate; and **Marcia Wood**, research director.

Carfax, Fairfax, Va., has named **Philip Moore** director of insights.

Horsham, Pa., consulting and research firm *LRA Worldwide Inc.* has named **Daniela Piacenza** senior research consultant.

At the London office of *TNS* **Kerry Brown** and **Jonathan Brown** have been named directors of the company's U.K. media division. In New York, **Shari Morwood** has been named executive vice president of technology, telecom and media, TNS North America.

TVG Marketing Research and Consulting, Dresher, Pa., has announced several promotions: **Karen Fender** to senior vice president and general manager; **Scott Lauder** to senior vice president, marketing training and consulting; **Barry Davis** to executive director; **Glenn Sokaloski** to executive director; and **Kathy Darmody** to director, tech operations.

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product and service update

Site offers market and company reports for free

U.K. information firm Vertical Edge Limited launched its new market research service, Free Research, at www.free-research.com. The site provides free access to more than 5,000 market and company reports across 27 global sectors, in addition to country guides and other sources. The site currently contains over 3,000 market reports covering 27 sectors globally. Company information is provided in the form of annual reports, 10Ks, 20-Fs and investor presentations. Country guides provide information on the economic and political situation in many countries. Market Insight reports contain market news, regulatory updates, new tender notices, product standards and other market- and product/service-related information. Lists of the most significant country-specific trade associations for each sector are also provided.

New tools from MarketTools focus on virtual shopping, online moms

San Francisco research firm MarketTools Inc. is now offering Shopper Impact, a suite of tools incorporating virtual shopping technology, research methods and sales knowledge to provide customer management solutions to help brands achieve their business objectives. Shopper Impact is designed to improve retail performance by quantifying and understanding consumer behavior, not just tracking movement.

Separately, MarketTools has also introduced the Moms Insight Network, which synthesizes input from millions of moms' online conversations to let marketers engage directly in ongoing conversations with moms to uncover needs and new ideas and turn those findings into products and services. The solution draws from a hosted proprietary community, ZoomPanel Moms. For more information visit www.markettools.com.

ORC services assist employers, electronics firms

Opinion Research Corporation, Princeton, N.J., has launched its Employee Research Practice, which offers tools for mid-size companies to measure employee engagement and alignment along several dimensions by assessing multiple drivers of performance.

Separately, the firm is also now offering its Out-of-Box-Experience service, enabling R&D engineers, product managers, software designers, support personnel and marketers to witness consumers' first impressions of electronic equipment - ranging from computers, cameras and handheld devices to home entertainment products - as they are unpacked, assembled and put to use. Using a series of focus groups to test initial consumer opinions of new products, the service enables companies to modify or correct product prototypes before a public launch.

With guidance from Opinion Research Corporation, focus group participants are recruited according to a client's pre-defined criteria, which typically include experience with the technology in question, whether they're professional or consumer users and whether they are owners of particular technologies.

The sessions are conducted in a purpose-built viewing facility where clients observe the session behind a mirror and see firsthand how potential customers would fare with the company's product. Moderators facilitate focus groups to understand how consumers navigate their way from opening the package to using the equipment. For more information visit www.opinionresearch.com.

Center provides ad word feedback from mobile kids

Regulus Communications Inc., a Lincoln, Neb., information research company, has created the Word-CHECK Center for the study and analysis of key words associated with brands and products marketed to kids. The goal of the center is to provide advertising and consumer research companies with ad word feedback for evaluating message copy and marketing content meant for the mobile youth marketplace.

Studies will focus on measuring the positive or negative words kids associate to specific snack food, fast food, soft drink and energy drink brands to help determine the success or failure of online marketing messages. Data from the studies will be formatted into word association trend reports for media content developers, media buyers, marketing directors, advertising agencies and brand managers. Special reports will also be developed for parents, nutrition education professionals and consumer advocacy groups.

Word associations will be studied among kids from the more than 30 countries participating in the Young Author's Magazine Anthology program for Internet classrooms. For more information visit www.regulus.com/wordcheck_center.htm.

Synovate practice focuses on market potential

The Chicago office of researcher Synovate has introduced a suite of models and simulators for quantifying the market potential of a product or service. The launch of the MVP - or Market Value Potential - solutions coincides with the creation of Synovate MarketQuest, the company's newest practice, which

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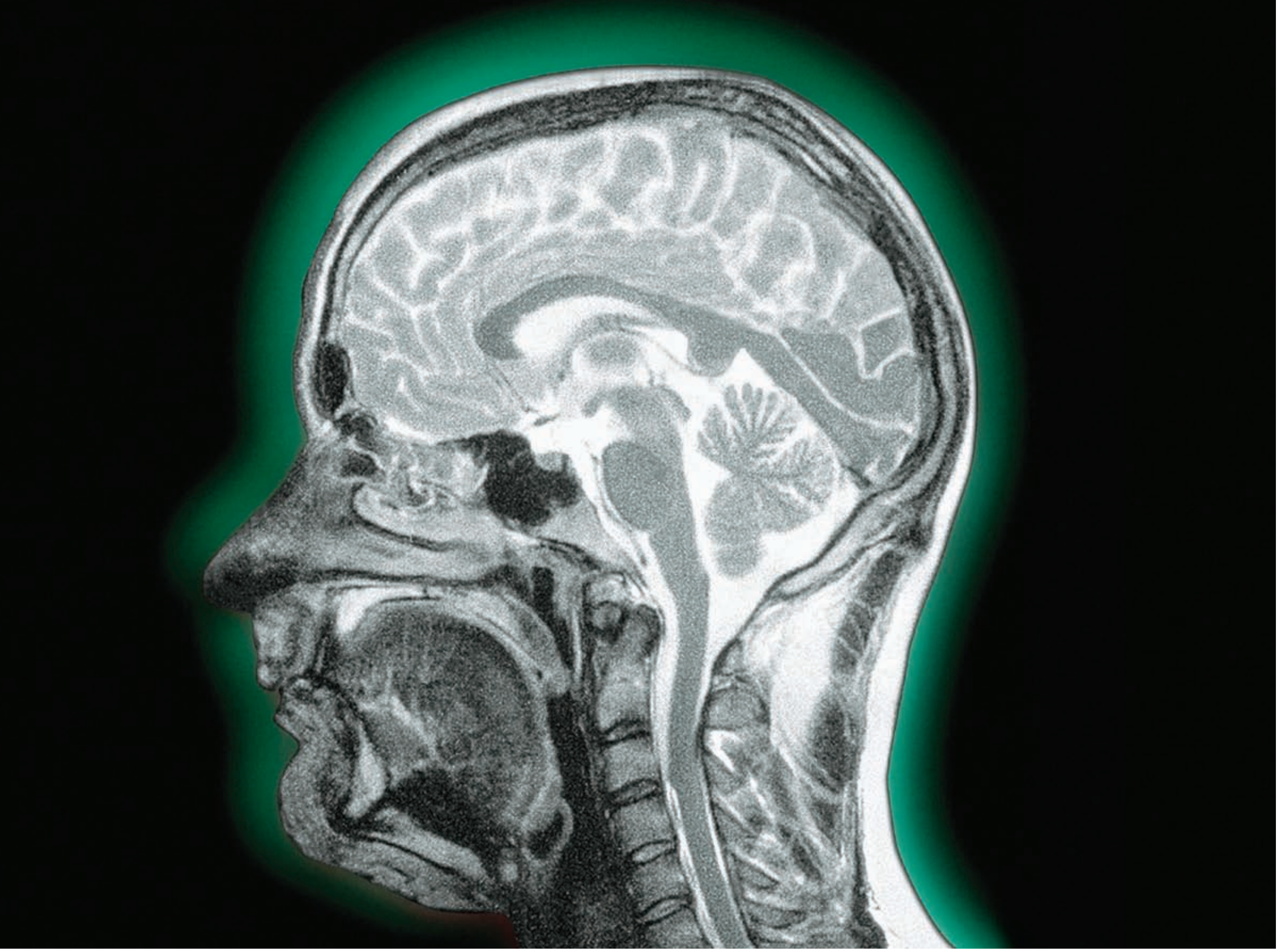

News notes

Scarborough Research, New York, announced in July that it had donated consumer research data to enhance the efforts of the Advertising Council's mission to effect positive social change. The Ad Council will use the Scarborough data to better target and promote local campaigns and extend the impact of their messages. Scarborough contributed its core syndicated databases and software to the Ad Council: 81 Top-Tier Local Market Studies, Scarborough USA+ (a national database), the Scarborough Multi-Market Study, and PRIME NExT (Scarborough's proprietary data analysis software). Scarborough will also provide training and support for all of the services contributed.

Interviewing Service of America, Van Nuys, Calif., is celebrating the 25th anniversary of its founding this year.

G & S Research, Indianapolis, is celebrating the 10th anniversary of its founding this year.

Researcher **Synovate** announced a new organizational structure for its Asian business in which its Asian operations will form the three smaller business unit groupings - called strategic units (SUs) - of China, North Asia and South Asia. Synovate China will form one of the new SUs with Synovate China's managing director Darryl Andrew being promoted to CEO of Synovate China. Jill Telford has been promoted to CEO of Synovate North Asia, another new strategic unit comprising Hong Kong, Korea and Taiwan. Tim Balbirnie has been named CEO of Synovate South Asia, the third new strategic unit comprising India, Indonesia, Malaysia, the Philippines, Singapore and Thailand.

In late July, Wilton, Conn.-based **Greenfield Online Inc.** announced that the company and certain current and former corporate officers have been named as defendants in a purported class action lawsuit filed in the United States District Court for the District of Connecticut.

As reported by mrweb.com, the complaint, against Finance Chief Robert Bies and former CEO Dean Wiltse, has been made by investor the Plumbers and Pipefitters Local Union No. 650 Pension Annuity Trust Fund. The Fund says that statements made between February and September 2005 deceived investors and pushed up the company's share price. It claims to have suffered "real economic loss" as a result of purchasing shares during the period.

The plaintiff is seeking to recover damages on behalf of all those who purchased Greenfield Online's common stock during the period. Greenfield said in a press release it believes that the allegations in the lawsuit are without merit, and it intends to vigorously defend itself against all allegations.

Acquisitions/transactions

Greenfield Online Inc. announced plans to start the process of separating its **Ciao Internet** survey solutions and comparison shopping business segments from an operational and legal perspective. "This decision is consistent with the steps already taken in the first quarter of this year to separate these business segments from a financial reporting perspective," said Al Angrisani, president and CEO of Greenfield Online, in a company press release. "We expect the process will be completed over the next six to nine months and believe it will help facilitate the growth of each business."

The company also announced that Ciao GmbH's two managing directors, Max Cartellieri and Gunnar Piening, resigned their positions with the company. Cartellieri co-founded

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Calendar of Events November-December

IIR will hold a research industry summit on data quality on November 5-6 at the James Hotel in Chicago. For more information visit www.iirusa.com/dataquality.

IIR will hold its FutureTrends conference on November 11-14 at the Ritz-Carlton, Key Biscayne, Fla. For more information visit www.iirusa.com.

IIR will hold a conference on marketing to men, women and Boomers on November 12-13 at the Marriott East Side, New York. For more information visit www.iirusa.com/mwb.

The American Marketing Association is sponsoring the 2007 Market Research Masters Consortium on November 12-16 at the NYU Torch Club in New York City. For more information visit www.schmalensee.com.

Salford Systems is offering training in data mining on December 3-7 in San Diego. Attendees may register for one, two, three, four or five days. For more information visit www.salfordsystems.com/us_registrations.php.

IIR will hold a conference on marketing research for the financial services industry on December 12-14 at the Trump International Sonesta Beach Resort, Miami. For more information visit www.iirusa.com.

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.

> data use

By Melvin Prince

Creating a new scale of brand prestige using latent class modeling

This article provides a conceptual framework and measurement tool for the study of brand prestige constructs, useful in marketing practice. Results provide evidence that two consumer value constructs – brand excellence and status conferral – may be reliably and universally measured, irrespective of a brand's product category. This is a considerable challenge, since for some categories, possession may be more important than functionality, while for others scarcity may be more critical than trendiness, etc. Brand excellence and status conferral constructs have been conceptually clarified and shown to be necessary dimensions for the explanation of brand prestige. The measurement scale developed is sufficiently sensitive to differentiate and classify brands by consumer joint profiles on the construct dimensions.

Research method

Descriptions of prestige brands were developed by a panel of marketing faculty judges who agreed on a subset of descriptive items that specifically indicated concepts of brand excellence and status conferral.

Survey respondents were exposed to four brands within a single product category. They were invited to state which of a series of brand descriptions especially applied to specified brands in the category under investigation. Each of the indicators was evaluated for its contribution to the latent class scales for brand excellence and status conferral, based on its significance for the model fit. Significance was tested by means of the maximum likelihood ratio chi-squared statistic (L^2) with and without the indicator. The items were analyzed for the fit to latent dimensions, in order to assess the discriminant validity of the constructs. Questionnaires also contained a seven-point rating scale to obtain overall prestige ratings for the same brands presented. These prestige ratings were used as the criterion for external validation of the multidimensional scale.

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Product categories in the present study were diverse, consisting of what judges viewed as prestige brands of golf equipment and wine. Brands of golf equipment analyzed in the study were TaylorMade and Titleist. Brands of wines analyzed were Kendall-Jackson and Robert Mondavi.

Data analysis used exploratory latent class factor analysis a) to explain correlations between nominal indicators of brand excellence and status conferral, and b) to classify consumers by factor levels for the constructs assigned to prestige brands. The analysis was replicated for two brands in each of the two categories, to test for scale test-retest reliability. Each product category was presented to an independent

sample. The latent class factor analysis used Version 4 of the Latent GOLD computer program (Vermunt and Magidson, 2005).

The study was conducted within a 25-mile radius of a public university located in the Northeast. The sample frame consisted of adults, 25-49, who were aware of the prestige brands to which they were exposed. Purposive sampling was employed from September 2005 to April 2006. Two surveys were conducted: n=120 for prestige golf equipment brands and n=130 for prestige wine brands. Personally conducted interviews were obtained from respondents who were qualified and agreed to be interviewed.

Results

Overall model fit

In a first stage of confirmatory latent class factor analysis, a two-factor measurement model was used to test for inherent scalability. This confirmatory model constrained indicators unrelated to a concept to zero values. Probabilities from this analysis indeed demonstrated the existence of a two-factor model fit. The latent class confirmatory factor analysis was then replicated with a latent class factor solution involving no constraints on indicators. This unconstrained model provided a slightly better fit. Unconstrained results are shown in Table 1.

Looking at the table, it's clear that the two-factor solution also consistently fits the measured brands. The fit for the brands is may be seen by the relative correspondence of degrees of freedom and L^2 values. A more rigorous statistical test completes the argument. Bootstrap L^2 values are calculated to minimize the effects of sparse data. For all brands, bootstrap p-values >.05 were found. This robust result provides strong and reliable evidence of a scalable model involving two latent factors.

Table 1: Two-Factor Latent Class Models

Model	L^2	df	Bootstrap p-Value
Prestige Golf Equipment			
TaylorMade	15.47	14	.30
Titleist	19.23	14	.20
Prestige Wines			
Kendall-Jackson	13.40	14	.42
Robert Mondavi	22.30	14	.10

Table 2: Loadings for Two-Factor Models

Prestige Golf Equipment

Indicators	Brand Excellence (F1)	Status Conferral (F2)	R^2
TaylorMade			
Envied	.2782	.3918	.2979
Feelgd	.0702	.8158	.6814
Highest	.6561	.2689	.5074
StrongRp	.6412	.1961	.4518
Quality	.6109	.3139	.4781
Titleist			
Envied	.1486	.6168	.4143
Feelgd	.2476	.6500	.6181
Highest	.5896	.2020	.3886
StrongRp	.6320	.2993	.4891
Quality	.7542	.1330	.5872

Prestige Wines

Indicators	Brand Excellence (F1)	Status Conferral (F2)	R^2
Kendall-Jackson			
Envied	.0556	.9042	.8246
Feelgd	.2151	.6896	.6782
Highest	.6619	.1632	.4652
StrongRp	.6399	.0741	.4153
Quality	.5696	.0623	.3284
Robert Mondavi			
Envied	.0847	.8752	.7734
Feelgd	.1309	.7793	.6247
Highest	.6829	.4117	.7935
StrongRp	.4955	.1400	.2686
Quality	.4657	.3739	.3761

Brand Prestige Scale Items*

Envied: "Brand users are envied by others." [a]
Feelgd: "Brand users feel good that others cannot afford it." [b]
Highest: "Its products meet the highest standards." [c]
StrongRp: "Has a strong reputation for excellence." [d]
Quality: "Known for superior quality products." [e]

**If it was felt that the item especially applied to a brand, the answer was coded yes. If not, it was coded no.*

[a,b] Status conferral subscale
[c,d,e] Brand excellence subscale

Factor structure

Factor loadings for the two-factor solution are shown in Table 2. For all brands, highest ("products meet the highest standards"), strong reputation ("has a strong reputation for excellence") and quality ("known for superior quality products") load primarily on factor 1, while envied ("brand users are envied by others") and feel good ("brand users feel good that others cannot afford it") load primarily on factor 2. Interpretatively, factor 1 is labeled brand excellence, and factor 2 status conferral.

To illustrate the factor structures, TaylorMade prestige golf equipment loadings for highest, strong reputation and quality are .66, .64 and .61 on factor 1 vs. loadings of less than .30 for factor 2. Kendall-Jackson prestige wine loadings for envied and feel good are .82, and .68 on factor 1 vs. loadings of less than .20 on factor 2.

Communalities (R^2) of indicators are consistently significant for the four brands. As cases in point, these values for the contributions of factors to the variance of each of the indicators range from .39 to .62 for Titleist prestige golf equipment, and from .29 to .79 for Robert Mondavi prestige wines. Finally, the explained total variance of each of the two factors is substantial for each brand, although it differs somewhat between product categories. Explained variances for prestige golf equipment for factors 1 and 2 are 55.6 percent and 44.4 percent (TaylorMade), 56.5 percent vs. 43.5 percent (Titleist). For prestige wines, explained variances for the respective factors are 47.7 percent vs. 52.3 percent (Kendall-Jackson) and 36.3 percent vs. 63.6 percent (Robert Mondavi).

Factor comparisons were made between pairs of prestige brands to assess reliabilities of comparative indicator loadings. Correlations of factor loadings were calculated for all five pairs of brands, regardless of product category. In every case the correlation was very strong, with p< .05. From Table 3 we see correlations

Table 3: Factor Comparisons Between Pairs of Prestige Brands

Correlations of Loadings

	TaylorMade	Titleist	Kendall-Jackson	Robert Mondavi
TaylorMade	1.00	.81	.73	.72
Titleist		1.00	.91	.73
Kendall-Jackson			1.00	.89
Robert Mondavi				1.00

All correlations significant at p <.05.

between Taylor vs. Titleist, Taylor vs. Kendall-Jackson, Taylor vs. Robert Mondavi, Titleist vs. Kendall-Jackson and Titleist vs. Robert Mondavi scoring .81, .73, .72, .91 and .73, respectively.

Predictive validity

Factor scores for each brand rated are assigned to respondents. An overall brand prestige rating given on a seven-point Likert scale is used as the criterion of predictive validity for the two subscales of brand excellence and status conferral. These brand prestige ratings are regressed on the subscales, by multiple stepwise regressions (Table 4). The regression fit is significant for each of the prestige golf and prestige wine brands, with $p < .01$.

Classification

Each respondent is also classified for each brand by levels of brand excellence (factor 1) and status conferral (factor 2). These levels are ascribed based on the respondent's response pattern and the associated probabilities for each level of each factor. There are four types: 1) utterly banal: low brand excellence, low status conferral; 2) baselessly ostentatious: low brand excellence, high status conferral; 3) unaffectedly fulfilling: high brand excellence, low status conferral; and 4) irrefutably prestigious: high brand excellence, high status conferral. Segments of respondents for these types for each brand are shown in Table 5.

For TaylorMade and Titleist golf equipment brands, the largest segments are types of consumers who see the brands as utterly banal (low on both dimensions, 52-54 percent). Differences in segments between TaylorMade and Titleist are seen for the baselessly ostentatious type (low brand excellence and high status conferral classes, 22 percent vs. 12 percent). For the unaffectedly fulfilling type (high brand excellence and low status conferral) it is the other way around, 18 percent vs. 27 percent. However, for both brands, the smallest type found is that of respondents who score the brands irrefutably prestigious (high on both dimensions, 6-7 percent).

For Kendall-Jackson and Robert Mondavi prestige wine brands, the most frequent types also see the brands as utterly banal (scoring the brands low on both dimensions, 42-33 percent). Differences in prevalence between Kendall-Jackson and Robert Mondavi are seen for the baselessly ostentatious type (low brand excellence and high status conferral classes, 12 percent vs. 19 percent). For unaffectedly fulfilling type (high brand excellence and low status conferral) segments the reverse is true, 36 per-

Table 4: Regression of Overall Brand Prestige Rating on Factor Scores for 2-D Factor Models

Prestige Golf Equipment

Model	ss	df	ms	F	sig
TaylorMade					
Regression	25.813	2	12.907	8.508	.0
Residual	177.487	117	1.517		
Total	203.300	119			
Titleist					
Regression	87.963	2	43.981	23.189	.0
Residual	221.904	117	1.897		
Total	309.867	119			

Prestige Wines

Model	ss	df	ms	F	sig
Kendall-Jackson					
Regression	31.576	2	15.788	13.740	.0
Residual	145.932	127	1.149		
Total	177.508	129			
Robert Mondavi					
Regression	36.819	2	18.409	17.039	.0
Residual	137.212	127	1.080		
Total	174.031	129			

Table 5: Joint Profile Class Sizes of Prestige Brands

Class		Prestige Golf Equipment		Prestige Wines	
Excellence	Status Conferral	TaylorMade	Titleist	Kendall-Jackson	Robert Mondavi
low	low	.5225	.5433	.4150	.3339
low	high	.2233	.1248	.1198	.1915
high	low	.1781	.2698	.3610	.3016
high	high	.0761	.0620	.1042	.1730

cent vs. 30 percent. For both brands, the smallest type found is the irrefutably ostentatious type (respondents who score the brands high on both dimensions). The difference is noteworthy (10 percent vs. 17 percent). In sum, classification and cluster assignment appear to be quite sensitive to measured brands and product categories.

Building blocks

Brand prestige constructs can be building blocks embedded in more comprehensive models of prestige brand motivation and consumption. For example, causal relations between such variables as consumer sensitivity to status symbols, prestige brand values and consumer terminal values, e.g., hedonism, belonging, etc., may be explored in future research.

The present research on scale development was based on two quite different product categories: wine and golf equipment. While seemingly robust, the scale may be further tested and validated on prestige brands in a number of other product categories, such as fashionable lingerie, upscale automobiles, super-premium spirits, luxury food and beverage suppliers and higher-end appliances. In the course of such testing and continual development, the instrument may be refined and upgraded with new items, measurement levels and techniques. The generalizability of the scale should be established by conducting research that includes demographic and behavioral segments, as well as other geographic locations where cultural differences may be at work.

Finally, the scale should be utilized in real-world settings where marketing problems of prestige brands need to be solved. Strategic and tactical applications will permit the ultimate validation test. They also will generate new, important streams of research on this critical and neglected area. | Q

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By Robert J. Morais

Ad recall trends:
over, under, sideways, down?

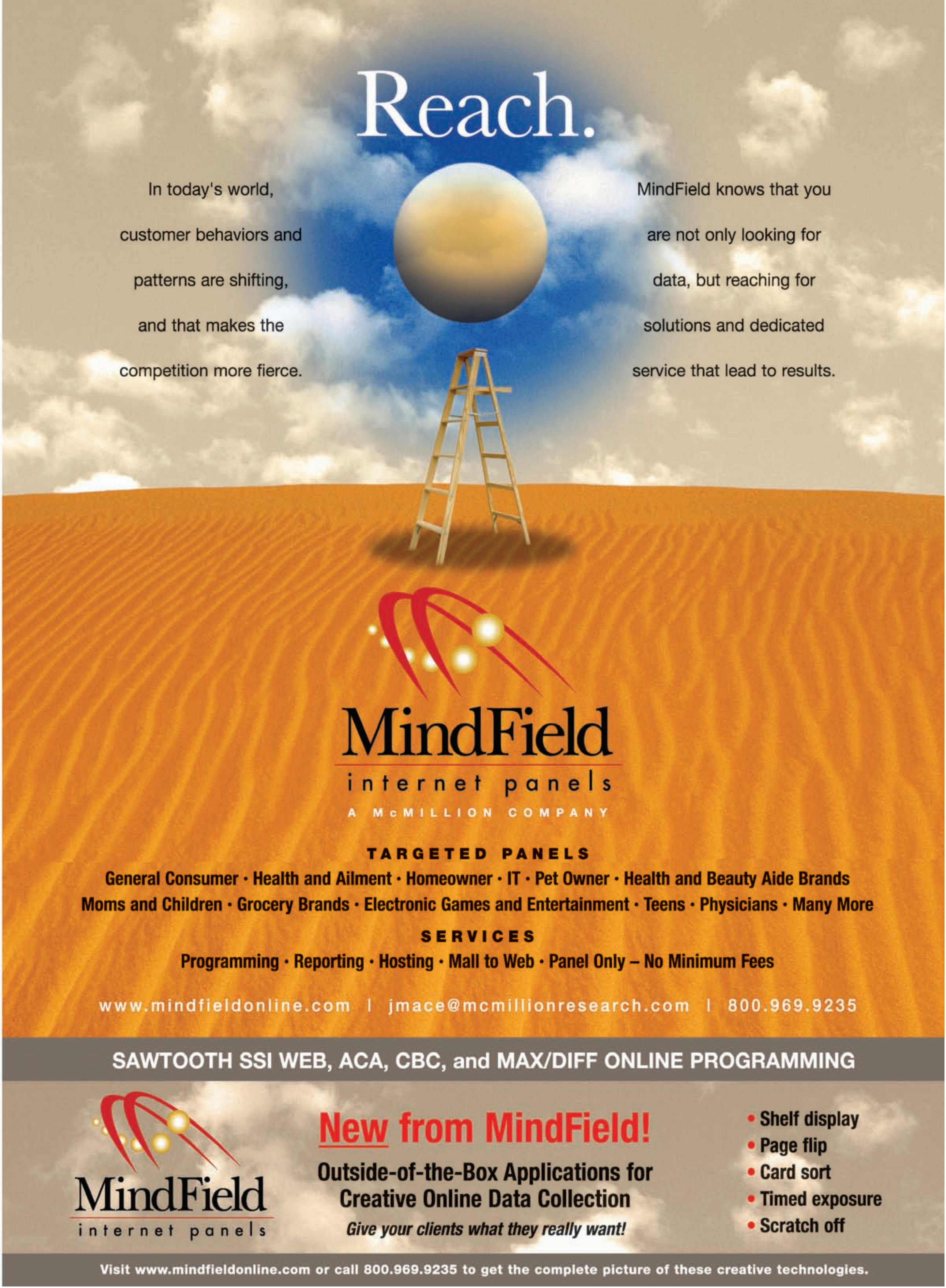
Advertising agency executives have long been wary of recall testing. They worry that single-exposure recall tests do not represent the impact of multiple advertising exposures and that guidelines for generating high recall inhibit creativity. They contend that advertising recall is less important than persuasion. They fret that recall scores are lower for new products and services. Some agency executives complain that low recall scores lead to uncompensated agency labor on new, clutter-busting campaigns that clients demand. In addition to these concerns, numerous agency executives and many clients believe that recall scores have edged downward recently. Executives attribute this movement to the distractions of the Internet and video games, increasing advertising clutter and demands on consumers' attention in the first decade of the 21st century.

If advertising recall has declined over the years, comparisons with historical databases must be adjusted or databases must have a limited time frame with norms that reflect only the past five to 10 years of data. If recall has remained constant, such adjustments, and the attendant worries, are unwarranted. If recall has increased over the years, the industry will need to adjust expectations upward.

We decided to examine the database of television commercials that we recall-tested over the past few decades. The segment of commercials we analyzed consists of over-the-counter health and beauty aids and household products. These categories limit the scope of our report; we do not claim that our findings represent recall scores for automobiles, financial services, fashion, telecommunications, soft drinks and countless other types of advertising. We do feel that the findings merit consideration by all marketers and their advertising agencies. We invite executives engaged in categories that we have not analyzed to conduct a longitudinal study of recall scores and share them with our industry.

Editor's note: Robert J. Morais is a principal at Weinman Schnee Morais Inc., a New York research firm. He can be reached at 212-906-1900 x26 or at rmorais@wsm-inc.com.

For our analysis, we mined our database of over 500 30- and 15-second television commercials. Our recall test method entails recruitment of a random sample of respondents to watch an on-air TV show who are told that they will be called back the following day for their reactions to the program. The day after exposure of the advertising, respondents are asked if they saw a commercial in the category of the test commercial. If a further recall aid is needed, they are given a cue for the product's brand name. We look at two key recall measures: related recall, when the respondent is able only to play back a generic sales message that is universal to the category, and proven recall, which is met when the respondent can describe specific visual or audio elements in the commercial or express a unique sales message from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the commercial. We divided the 30-second commercial database into two segments, 1978-1991 and 1992-2005, and the 15-second commercial database into two segments, 1985-1995 and 1996-2006. We compared mean recall results for each commercial length across the time periods.

For 30-second commercials, we found that average related recall dropped from 24.7 percent to 22.5 percent and that proven recall was flat, from 21.7 to 21.5. For 15-second commercials, related recall decreased from 18.7 percent to 16.6 percent and proven recall from 17.4 percent to 15.6 percent. We isolated more recent data and found a slight uptick for related and proven recall, but the larger, longer-term data sets are more indicative of a trend. We suspect that the long-term changes are linked to increased commercial clutter and distractions like the Internet. Our methodology controls for some distractions because we instruct respondents to tune into a particular program, but we can not control whether or not they are surfing the Internet while watching the program.

What can we conclude from these findings? Advertising executives and marketers can relax a bit; recall scores in the categories we tested have not tumbled dramatically. Still, a two-point decrease in advertising recall is statistically significant for our database. Executives who correlate that reduction with lost sales will certainly worry - and they will press harder to create advertising that is remembered. For many companies, this change is so small that they will not see cause for concern. Companies that attribute the downward recall trend to competition from other media may become more aggressive in adopting online, word-of-mouth and other less traditional venues.

Don't overreact

We suggest that recall tests continue to be read closely but we do not recommend overreacting to the trend that we uncovered. Advertising research is an aid to, not a substitute for, judgment and recall testing is one of several tools that support our judgment. Assessments of comprehension, likeability, persuasion and other variables also play a key role in the decision-making process. Professor Joel S. Dubow suggests that we think of "recall as the ignition system of an automobile and persuasion as the fuel system" and notes that "the fuel system doesn't get a chance to perform its function if the ignition system is too weak to start the car."

Now that we know that the ignition system is not performing the way it used to, we should check the fuel gauge. Have norms for persuasion and other communication measures also changed in the past 20 to 30 years? That question should be examined on another day. | Q

By Tim Macer

Vision Critical

Editor's note: Tim Macer, managing director of U.K. consulting firm meaning ltd., writes as an independent software analyst and advisor. He can be reached at tim.macer@meaning.uk.com.

The market for online research packages may already be crowded with competing solutions, but there is still room at the top for quality solutions that go beyond the first-generation products which abound today. It is a position that one relatively new entrant to the market – Vision Critical, a Vancouver start-up which launched in 2003 – is aiming for. With over 120 clients already signed up, it is showing early signs of success. It is the brainchild of veteran Canadian marketing researcher Angus Reid, whose eponymous research company became the Canadian arm of Ipsos a few years ago. The benefit of having Reid's critical vision – informed not by technology but by a practical knowledge of research and an up-to-date understanding of the issues the industry faces – shines through clearly in the product.

More than any other software I have reviewed to date, this is a product that acknowledges almost equally the needs of researchers, research clients and, with impeccable grace and style, the often overlooked needs of respondents. If you are looking for a more respondent-friendly way of conducting research, then this could be your ideal starting point.

The software is provided exclusively as a hosted ASP solution – the company is not interested in providing an enterprise solution – and all of its capabilities are invoked from a Web browser interface. For this and other reasons, it is a solution which will appeal more to researchers and insight managers working within commercial enterprises rather than the larger research company. But smaller research and consulting practices could also find this brings them the means to compete with big guys with online surveys and panels. It comprises five key functional components: panel member administration, sampling, a nifty survey authoring tool, survey deployment and two reporting modules: a simple real-time tool and a more advanced tool about to emerge from beta testing. While other providers vacillate between building reporting systems for online interaction via data portal or complex reports (such as those produced with Quantum) Vision Critical's new Dynamic Reports module does ei-

Vision Critical (www.visioncritical.com)

Pros
- Integrates powerful panel management with online surveys and real-time reports
- Respondent-friendly and online community-building features
- Makes all pre-existing data available to all new surveys, both quant and qual

Cons
- Authoring and management is Windows- and IE-only
- ASP-only, which requires a stable Internet connection to use
- No enterprise version offered

ther or both from the same interface. Reports are either published as PDF, Excel or Word files, or are published to a Web server and then dynamically updated when the data is changed.

Slow to provide tools

Research technology firms have been slow to provide adequate tools to let researchers build and administer panels for themselves, and some are still equivocating about doing so. Even among the tools that offer so-called panel support, the hard work of panel administration, incentive management and creating the "community" aspects of the panel is often left up to the user, requiring the writing of software or sourcing of third-party applications to do the job. Vision Critical comes with these online community-building capabilities as standard features. For example, it provides the means to edit your own online newsletter for panel members. It offers a content management system to let you publish findings and reports to your panel members, which is critical when creating panels of professionals in most industries. It blurs the edge between researcher-led and participant-led discussion by offering forums (either using its own tool or linking to other widely-used Web-based solutions) which move it into the realms of Web 2.0 research, with its emphasis on user-generated content and social interaction.

It is in the connection between panel and surveys that one of the principal differences of this software emerges. Just about every other Web survey tool organizes its results database into discrete projects. There may be a connection between the panel data and the survey data, but each project is effectively marooned in a silo of its own. With Vision Critical, everything is attached to the respondent, so not only are the profiling data available from the initial registration survey, but so too is every item of data collected on any subsequent survey the respondent has taken. If you go back to the same set of respondents in a longitudinal survey, then all prior responses will be available for you to base questions on in the next survey, or to use for routing, sample selection or quota control, but also at the analysis stage. As long as the respondent was asked the question and provided an answer, anything can be crossed by anything.

Organizing principles

In case this sounds like chaos in the making, with a minestrone soup of a million questions to choose from, order is provided through two organizing principles. First, there is a decent search capability, and second, questions are always grouped within the project they belong to. Indeed, questions must have a unique name within each project, but can be reused across surveys, which avoids having to think of fresh and interesting ways to describe age and gender on each new project. In effect, a project is merely a view or a slice through the database.

It is a clever approach which you can flex in other useful ways. You can, for example, create a dummy project of information imported from external data sources, which could be something as modest as an Excel file containing some client-supplied sample or data fed in from a corporate data warehouse.

I also liked the question design and survey administration interface and its elegant workflow model. They are good, but not the radical departure from convention that the panel module embodies, though they are simple to use and rich in functionality.

Switched to Vision Critical

Dru Ann Love is a primary research analyst at BusinessWeek Research Services. In addition to carrying out surveys and polls that often appear in the pages of *BusinessWeek* and surveys among the publication's print and online subscribers, the research group operates as an independent full-service custom research provider to a diverse range of external customers. One of its prized assets is its BusinessWeek Market Advisory Board - a controlled access panel of many thousands of business leaders and opinion-formers.

At the start of the year, BusinessWeek Research Services switched to Vision Critical as its online research and panel platform in order to bring control of its panel in house. Although the panel is actually hosted on Vision Critical's servers, Love is able to carry out all of the management aspects concerning the panel's operation for herself. "When we had the demo, our reaction was 'Wow! You can do all of this.' And once we started using Vision Critical, it was really good. I enjoyed it - it was really fun," she says.

One of the first tasks for Vision Critical was to migrate the magazine's high-profile panel into its panel management suite. "Their role was instrumental as we migrated our existing panel," Love says. "And they used a better profiling questionnaire than we had previously." This has enabled Love's group to obtain much more complete information about panellists.

Love also points out the sample selection capabilities as being a particular strength of this software: "I have control over who I select, and I can verify the source of my target markets. For example, if I need to select a target of high-level executives, I can see exactly who I've got, and I know to my satisfaction that I've got the group that I am targeting," she says.

Her assessment of the questionnaire design module is also that it is "attractive and easy to use." Again, Vision Critical, as a part of the migration process, defined templates so that the panel members' portal and also the surveys have a consistent look and feel, reflecting the *BusinessWeek* design ethos.

Love uses the built-in reporting features while the surveys are active.

"I really like their online status report which shows the number of completed surveys. It gives me an idea of how many people are taking my survey at any particular time. If I start noticing that I am not reaching my target, then I can send another e-mail blast to get some more respondents."

The Research Services group uses SPSS to carry out its data analysis. SPSS is one of the data formats supported by Vision Critical, so Love is able to download an SPSS file ready for analysis from the server, complete with all the variables, labels and text definitions filled in, as well as the data.

"I have no complaints," Love concludes. "The software is very good, and the people have been nice too whenever I have needed to contact them."

Isn't much to dislike

There isn't much to dislike in what I saw either. Although the system places an emphasis on providing a better environment for respondents, and several of the demo surveys on Vision Critical's Web site show advanced use of Flash animation for drag-and-drop questions, product-on-shelf animations and so on, these are currently all custom-built. The firm is working on the means to create these with less effort – as are some of its competitors – but there is no magic solution yet. And while the interview part is platform- and browser-neutral, it is a pity that you can only use Microsoft Internet Explorer on Windows for any of the admin or creation functions. Haven't they noticed how many Web designers are using Macs these days?

Its cost model is appealing. There is none of the complexity of volume-based pricing with the equally opaque volume-based discounts that most online Web survey providers follow. Vision Critical is charged in several simple steps according to the size of your panel database. A license for up to 5,000 panelists will cost you $2,500 per month and prices go up in $1,000 increments for each additional 10,000 panel members.

A small number of add-on modules, such as the new Dynamic Reporting, will each add another $300-$500 to the monthly bill, but all of these prices are for unlimited users and unlimited servers. Vision Critical also provides set-up and migration services, which (for good reasons) are pretty much mandatory, so getting going is likely to require a one-off outlay of $15,000 to $20,000. However, for this, you will end up with a working panel with all the design work done to give you a consistent look and feel for the panel member pages as well as templates and question libraries for your survey design. If nothing else, this could spark a bit of a revolution in ASP online survey pricing. | Q

By Mike Mabey

Empowering the people

Utility uses customer satisfaction to drive organizational change

Sure you track customer satisfaction scores, but what do you do with the information? This is the story of a company that has successfully converted customer feedback into a powerful tool for organizational alignment and change.

Ten years ago, St. Louis-based Ameren Corporation did not exist. Created in December 1997 through the merger of Cipsco Inc. and Union Electric Co., Ameren purchased Cilcorp in 2003 and Illinois Power Company in 2004. Today, Ameren is an energy company with 2006 revenues that exceeded $6.8 billion. The company generates and delivers electricity and distributes natural gas to more than 2.5 million customers in four operating companies located throughout Illinois and Missouri.

Senior management recognized that there were many differences in how each of the four companies interacted with its customers. They decided to use customer satisfaction scores as a central driver for standardizing and improving service delivery across the organization.

Richard Mark, senior vice president of energy delivery for Missouri, started asking questions about customer satisfaction. What was being measured? How was it measured? How were the results used? Mark came to Ameren from a hospital background, where continuous process improvement in patient-related areas was critical. He believed that Ameren needed to think

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Enter Atlanta research firm CMI. Ameren engaged CMI in August 2005 to assist in designing and implementing three elements of the company's strategy for standardizing and improving service delivery:

• a process improvement implementation team to champion organization-wide process, system and culture changes;

• a process-focused customer satisfaction market research program that would identify opportunities for improving satisfaction in high-volume/high-impact company-wide service transaction areas;

• an online reporting system for providing customer satisfaction results to the field on a monthly basis.

Change is never easy

One of the most important challenges surrounding the implementation of a new system is making it successful within the context of the organization. Organizational change is never easy, and it needs ongoing, high-level support and focus. So, to ensure organization-wide buy-in, Ameren senior management established a peer advisory panel.

The panel is a 22-person, cross-functional team drawn from the four operating companies and representing key areas of the company: construction services, corporate communications, gas operations, call center, metering, engineering, field services, billing and credit, and IT.

Senior management recruited panel members regarded as respected leaders who would be instrumental in gaining support for the initiatives from all parts and levels in the organization.

The peer advisory panel's mission was established to re-center the organization around improving customer satisfaction, with responsibility for:

• advising senior management on customer satisfaction;

• reviewing satisfaction results quarterly;

• identifying and prioritizing where improvements need to be made;

• actively developing and leading improvement teams; and

• recommending changes in the customer feedback system to target processes that should be improved.

Establish credibility

The panel's first essential tasks were to establish the panel's credibility and obtain organization-wide buy-in. Panel members identified company-wide immersion in training of potential online reporting system users as the best strate-

A Process for Establishing the Process

Building a process implementation team requires the following:

1. The leadership of a C-level champion
2. Creation of a peer advisory panel that represents all areas of the organization
3. Identification of short-term goals for quick, high-profile "wins"
4. Assembling of panel task teams with clear accountability and decision-making powers over specific improvement areas
5. Implementation of a successful improvement initiative based on customer feedback
6. Effective employee communications
7. Regular follow-up meetings to report on current initiatives and identify the next set of initiatives

gy for gaining buy-in and raising the panel's profile. They developed a goal of conducting 80 training sessions in five weeks to train and encourage employees across the four operating companies to use the new online customer satisfaction feedback tool.

The first training session was held at Ameren headquarters, where CMI trained the peer advisory panel members in using its online reporting system before panel members embarked on their own ambitious organization-wide training program. The system is CMI's Web Insights Navigator (WIN).

Although many panel members were reluctant to volunteer as trainers initially because they expected the system to be complex and challenging to learn, after taking the training themselves, all felt comfortable enough with WIN to sign up for the task.

Following WIN training, teams of panel members fanned out across the organization to conduct the front-line manager training sessions in two states, four operating companies and 23 divisions. They focused on highlighting how managers could use the quantitative results to manage their divisions better through previous months' results received on the first business day of the following month. In addition, managers could use WIN to provide customer verbatims to field services crews, showing what customers liked and didn't like about their service crew interaction. This was information field operations never had before and it was enthusiastically received. It resulted in immediate widespread use of the new reporting tool. This success, coming early on in the process, created visibility for the panel and raised the profile of customer satisfaction feedback at the operations level.

The peer advisory panel has achieved success, both organizationally and on a personal level for its members. Although the 22 members were initially asked to commit to serve for only one year, all volunteered not only for a second year but have just re-upped for a third year of service.

Four steps

Development of the new market research program involved four

steps:

1. Identify who and what to survey.
2. Identify types of questions and procedures common to all operating companies that would result in actionable information.
3. Develop the questionnaire.
4. Conduct a benchmark pilot study that would be used as a teaching and buy-in tool for future users of the information.

One of the concerns with Ameren's previous customer satisfaction efforts was that literally hundreds of transaction types were surveyed, with only a few completed interviews per type. This resulted in data that was anecdotal at best and could not be used to make decisions or determine the severity of a potential problem. CMI and Ameren decided to focus the survey on a limited number of critical areas, working together to identify key service delivery elements common to the whole organization. This ensured strong, defensible measurement statistics in each area, eliminating the problem of information that had little statistical validity or credibility.

In order to identify who and what to survey and the types of questions needed, CMI did the following:

1. Conducted internal interviews. We began with learning more from Ameren's internal customers to make sure the results of the research program would meet the needs of Ameren's management and other users of the information. The interviews were also used to examine hunches and current thinking about Ameren's customers and begin to align internal perspectives. The interviews focused on uncovering elements that are important to customers' satisfaction regarding specific types of service work, along with the elements of the service work that could result in actionable information.

2. Conducted external interviews. Commercial and residential customers were interviewed. The results would begin to define the landscape for customer needs and the foundation from which to begin to develop a plan for actionable process improvement. Special attention was paid to the language that customers used to describe processes and their experience.

3. Created alignment. Based on information collected in the internal and external interviews, the Ameren/CMI team identified eight customer transaction areas that would encompass the bulk of important customer touchpoints. These were used as the basis for a day-long brainstorming session conducted with the newly formed peer advisory panel and facilitated by a CMI moderator. The session resulted in internal alignment on five transaction areas that would serve as the focus for the organization: new business, electric outage

response, lighting repairs, meter connections and gas leak response. The discussions about which five to choose and specific questionnaire topics for inclusion were spirited and rewarding. An additional outcome of the session was an acronym for the program – FOCUS - which stands for Field Operations CUstomer Survey.

Prior to full-scale rollout of the research program in January 2006, a pilot customer satisfaction study was conducted with 3,000 customers over a six-week period. The results were used to create a benchmark and to serve as the data set for training peer advisory panel members on how to train others to use WIN.

Slow to arrive

Easy access to timely results was deemed a critical factor in Ameren's strategy. As mentioned earlier, previous customer satisfaction results were slow to arrive at the division level and difficult to use easily. WIN provides a platform for accessing survey results anytime, anywhere. Monthly results are available on the first business day of the following month. The results are available for all authorized users - from the corporate level to state, division, operating center and work-group levels.

The online reporting contains graphs illustrating key measures and links that allow users to drill down to more detail. All survey results, including verbatim comments, are presented online. Verbatims can be searched by key word and can be sorted by respondent satisfaction score, transaction, division, state or other criteria specified.

Putting a system-wide online reporting system in place required four steps:

1. Determine the user set - the levels of management that would need access, user password hierarchy, etc.

2. Determine user needs - the data users want to see and the types of reports needed, from executive summaries down to customer verbatim responses used by field service crews in the local offices.

3. Develop and test the system, including the look and feel of the site.

4. Train the trainers.

Development of WIN began with an intensive two-day meeting at CMI's offices with representatives from the peer advisory panel. The team determined who would be using the site, what would be available on the site and the types of filters that would be built into the system so that users from all levels of the organization could access the results they needed. Mock-ups of all major screens were created so that panel members could see what the reporting system would look like before it was created. This allowed them to get internal buy-in and create early buzz within their organization for the new system.

Number of successes

After only two years, Ameren's peer advisory panel, customer satisfaction market research program and online reporting system have resulted in a number of successes.

CMI meets with the panel quarterly by phone and semi-annually in person to review survey results and current process improvement initiatives and to hold a half-day planning session for the next set of initiatives. Identification of new improvement initiatives frequently leads to questions about specific processes, generating the need for incorporation of new survey questions. The result is that the survey instrument and WIN change regularly as new areas for improvement are identified. Of course, core questions needed for tracking are maintained, but the panel has chosen to view the survey instrument as not just a tracking vehicle but also as a tool for improvement, an information resource that evolves to meet changing needs.

One area of change is in how the divisions and service areas are defined. After using the system, managers quickly saw that redefinition of divisions and areas would make the information more actionable for them. By eliminating information about functions and activities over which they had no control and ensuring that they had information pertaining to the areas for which they were being held accountable, managers could focus their efforts more effectively. As a result, divisions have been realigned and new divisions added to better reflect improvement priorities and accountability of managers.

Ameren saw another interesting behavioral shift emerge. WIN, which was immediately accepted and is used by all levels throughout the organization, has allowed the divisions to benchmark themselves against other divisions that they saw as comparable and use that information as the basis for improvement. For example, one feature of the system enables the user to roll his/her mouse over an area of the screen to bring up the best-in-class division name and contact information, allowing managers to easily follow up with a peer for advice. Information such as this has opened the door for consulting with others in the organization, creating a more collaborative environment.

Basis for action

Furthermore, the peer advisory panel is using WIN results as the basis for action, change, goal setting and compensation. The results give them places to look for improvements and problems. For example:

• For electric service problems, panel members created a process to provide on-site communications with the customer and/or a follow-up call stating that the company worked on the customer's problem and the cause of the problem.

• Panel members also identified a gap in communications regarding lighting repairs. As a result of the survey, managers determined that customers didn't know if or when repairs were made, and as a result were giving low or neutral satisfaction scores. The panel developed a standard for communication with customers regarding their streetlight orders. An automated callback is made to inform a customer that his or her request has been completed, more extensive repairs are needed or that the light is not Ameren's. This has increased lighting repair customer satisfaction scores dramatically.

• The panel identified the problem of managers being held accountable for services and staff that they do not manage. The result is the creation of a new division that removes those services and staff to another division where responsibility is direct.

• The panel determined that new-service processes were not working as desired. An initiative team was created and recently returned to the group with a set of recommendations for changing the whole process, including installation of customer service staff that are specially trained to work with contractors, developers and others involved in new services requests and installations.

• For 2008, the panel is looking at changing the service transaction areas that are measured. Some areas are doing extremely well and really are not candidates for significant improvement, although it is important to keep the scores at a high level. As a result, during the August 2007 meeting it was decided to reconsider some of the areas not included in the original August 2005 meeting to focus on new areas that may need improvements.

Truly customer-centric

By working with the peer advisory panel and Ameren management, CMI has been able to bring focus to what was previously a scattershot approach to customer service measurement. The result is an organization that is truly customer-centric and effective at responding to its customers' needs.

There are five requirements for this type of strategy to succeed:

1. There must be visible C-level support and encouragement.

2. The feedback mechanism must be timely, accessible and easily used by all levels of management.

3. The implementation team must be knowledgeable and respected by those affected.

4. The organization's incentive and reward system must reflect the new focus.

5. The survey questions must result in actionable information. This means that the survey must be continuously reviewed for opportunities to update the content to meet the latest needs of the organization. | Q

By Johann Leitner

Driving the message home

As part of the global Budget organization, Budget Rent a Car in South Africa operates a large network of over 80 branches located throughout South Africa, Namibia and Botswana. In-terminal branches at all major airports ensure that no matter how customers choose to reach their destination, Budget Rent a Car is never far away.

In the highly competitive car rental business, Budget strives to consistently deliver world-class customer service and continuously find ways to further improve the experiences of its customers. With the relative ease of moving to a competitor the need to retain existing customers and build brand loyalty are critical for success.

It is especially important to immediately identify customers who are dissatisfied with Budget and to rapidly address their concerns. Budget caters primarily to the business traveler, so the lifetime value of each customer is substantial.

Cell phone-based feedback system lets Budget Rent A Car respond quickly and effectively to customer complaints

As most travelers are busy and in a hurry to get to their next destination, Budget strives to minimize the time it takes customers to collect or return a car. As an example, the Budget Fastbreak program removes the necessity for the customer to sign any documentation at the time of vehicle collection. On arrival, the customer simply proceeds directly to the Fastbreak dedicated counter, where the keys are handed over. "Unfortunately these and other programs limit the opportunity to interact with customers at a personal level and obtain feedback about their experiences with the car or service they received," says Bev Vorster, Budget business support manager. "Customers who have had a negative experience, in most instances, do not have a channel to complain and simply move to a competitor the next time they hire a car while sharing their negative experience with friends and colleagues."

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Low response rate

To get customer feedback, Budget in the past had used pre-paid reply survey cards. However the effectiveness of this method to capture and immediately respond to customer issues was very poor and the overall response rate very low. It typically took up to three months for a customer to get a reply to their complaint as the survey cards had to be delivered to a central point at the head office, manually captured into a computer system, assessed by a customer service representative, sorted in terms of type of complaint and then an appropriate response had to be formulated. In most cases the customer simply received a form letter from the Budget CEO advising that their issue was being looked into and steps were being taken to avoid a recurrence. This delayed and impersonal method of communication had the potential of further alienating customers and driving them to competitors.

In 2004 the Budget corporate customer service management team was introduced to the ESP customer feedback management system developed by South Africa-based research firm Touchwork. The system captures and provides customer feedback using cell phone-based text messaging, letting Budget immediately act on negative feedback and address customer concerns. Budget realized that this would resolve many of the shortcomings of the reply card process and enable it to further differentiate itself from competitors.

With the widespread use of cell phones across all sectors of the population and the growing use of text messaging, Budget also wanted to be seen as an innovator in using new technologies to further enhance its reputation as a leader in its space.

Core part

The ongoing customer satisfaction campaign was launched in May 2004 and forms a core part of Budget's customer satisfaction and performance management initiatives.

Budget determined that the following six survey questions represented the most critical issues related to a customer's experience. A simple yes/no response to each question was deemed adequate to identify service delivery issues and initiate follow up action.

Q.1: Did you receive fast and courteous service when you rented your car?

Q.2: Did you receive fast and courteous service when you returned your car?

Q.3: Were our people neat in appearance and pleasing in attitude?

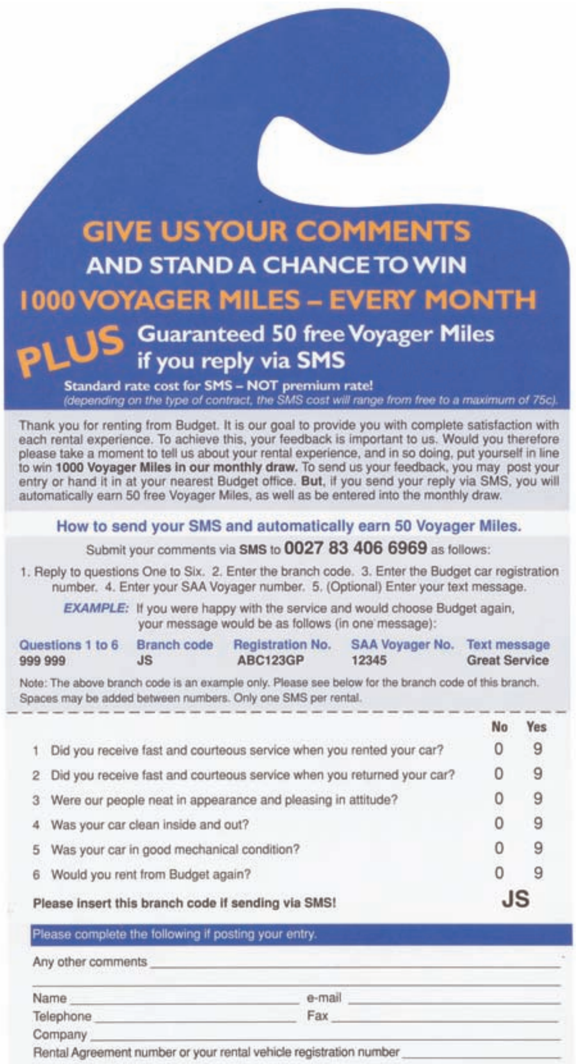
Q.4: Was your car clean inside and out?

Q.5: Was your car in good mechanical condition?

Q.6: Would you rent from Budget again?

In addition to these responses, customers had to provide a branch code and could include additional comments.

These questions, along with simple instructions on how to send a response, are printed on a hanger (Figure 1) which is placed on the rearview mirror of every car. This placement ensures that the customer will notice the survey, as the hanger must be removed before driving the car. Posters were also created for display within each branch.



GIVE US YOUR COMMENTS
AND STAND A CHANCE TO WIN
1000 VOYAGER MILES – EVERY MONTH
PLUS Guaranteed 50 free Voyager Miles if you reply via SMS
Standard rate cost for SMS – NOT premium rate!
(depending on the type of contract, the SMS cost will range from free to a maximum of 75c).

Thank you for renting from Budget. It is our goal to provide you with complete satisfaction with each rental experience. To achieve this, your feedback is important to us. Would you therefore please take a moment to tell us about your rental experience, and in so doing, put yourself in line to win **1000 Voyager Miles in our monthly draw.** To send us your feedback, you may post your entry or hand it in at your nearest Budget office. **But**, if you send your reply via SMS, you will automatically earn 50 free Voyager Miles, as well as be entered into the monthly draw.

How to send your SMS and automatically earn 50 Voyager Miles.

Submit your comments via **SMS** to **0027 83 406 6969** as follows:

1. Reply to questions One to Six. 2. Enter the branch code. 3. Enter the Budget car registration number. 4. Enter your SAA Voyager number. 5. (Optional) Enter your text message.

EXAMPLE: If you were happy with the service and would choose Budget again, your message would be as follows (in one message):

Questions 1 to 6	Branch code	Registration No.	SAA Voyager No.	Text message
999 999	JS	ABC123GP	12345	Great Service

Note: The above branch code is an example only. Please see below for the branch code of this branch. Spaces may be added between numbers. Only one SMS per rental.

		No	Yes
1	Did you receive fast and courteous service when you rented your car?	0	9
2	Did you receive fast and courteous service when you returned your car?	0	9
3	Were our people neat in appearance and pleasing in attitude?	0	9
4	Was your car clean inside and out?	0	9
5	Was your car in good mechanical condition?	0	9
6	Would you rent from Budget again?	0	9

Please insert this branch code if sending via SMS! JS

Please complete the following if posting your entry.

Any other comments _____

Name _____ e-mail _____

Telephone _____ Fax _____

Company _____

Rental Agreement number or your rental vehicle registration number _____

Figure 1: Customers can't help but notice the survey invitation as it hangs from the rearview mirror of their car.

As an incentive to submit a response, customers are guaranteed 50 miles with the Voyager frequent flyer program provided by South African Airways (SAA). As Budget caters primarily to business travelers and has a partnership with SAA, the majority of its customers are SAA Voyager members and the 50 miles was deemed to be a meaningful incentive, one representing the equivalent of miles that could be earned via a $100 credit card purchase.

Budget branch personnel are not required to do anything more except than to bring the campaign to the attention of customers. Branch managers are instantly notified by an SMS text message whenever a negative response is received and are tasked to immediately follow up with the customer. Regional and corporate managers are also notified via e-mail.

Fivefold increase

Since the launch of the campaign, there has been a fivefold increase in the number of responses versus the number that were obtained using the pre-paid reply cards. It is anticipated that as customers become even more familiar with text messaging, the response rate will increase further.

All responses are stored in the ESP database and are available 24/7 on a secure Web site. A range of management reports is provided to identify trends and determine a customer satisfaction index for corporate reporting purposes. These are shown graphically as bar, pie and line graphs and include: response counts by branch, region as well as totals; general overview and question breakdown; negative feedback weekly, monthly and total; negative feedback by branch, region and total; negative response spread by question. Figure 2 shows a typical summary report of all negative responses by question over a six-month period.

Over 90 percent of responses have indicated that customers are completely satisfied with their experience and have included comments such as:

— "Very impressive service."

— "Superb as always."

— "Excellent service and good rate. Many thanks."

— "My couple of complaints handled promptly."

— "Nicely done!"

— "1st class."

— "Efficient and helpful."

Responses with negative ratings have given Budget quantitative information regarding areas requiring attention. This includes both overall issues that must be addressed at a corporate level such as improving certain processes and procedures as well as issues at specific branches.

Examples of comments received with negative responses include:

— "Car struggled to turn over every time I started it!"

— "Nice quick friendly service but the parking bays need to be open so the trolley can fit thru when returning the car."

— "Ensure more staff on Fridays!"

Core tools

Based on the success of the campaign to date, Budget plans to continue to use the ESP system to obtain customer feedback, Vorster says. "It forms one of the core tools

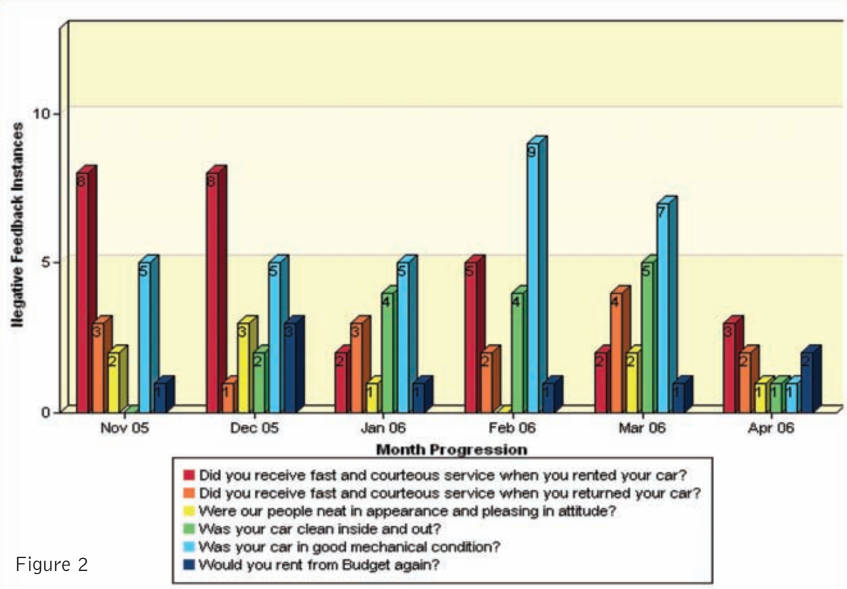


Figure 2

Budget uses in its quest for service excellence and has greatly assisted our customer retention and satisfaction initiatives."

Budget's assessment and conclusions regarding the use of the ESP system for its customer satisfaction campaign are as follows:

• Text messaging is providing an additional channel to communicate with customers and help build relationships.

• The immediate notification of branch, regional and head-office management ensures full visibility of customer issues.

• Areas for improvement are highlighted.

• Underperforming branches can be identified, enabling Budget corporate to take corrective action.

• Store managers are immediately notified of dissatisfied customers and can take appropriate steps to address the issues and prevent recurrences.

• Branch managers can compare their performance with that of the national average in an objective manner and identify areas for improvement.

"The most significant benefit has been the total surprise and positive reaction of customers when, after submitting a negative response, they are immediately contacted by a manager to address their issues," says Vorster. "In almost every case, customers who had indicated that they would not again rent from Budget were converted into repeat customers with a much-enhanced perception of

customer satisfaction research

Service matters

By Joe Cardador and Mark Hunter

Linking customer satisfaction data with business metrics

As consumers, we all understand that the shopping experience matters. There are legendary service companies like Nordstrom that consistently go above and beyond to make the customer experience extraordinary. Analysts largely consider this Nordstrom's advantage over its high-end department store rivals. Consistently delivering extraordinary customer service drives loyalty and market share. Then there are companies like Southwest Airlines that consistently deliver on their own unique customer promise. As evidenced by the airline's now infamous peanut fares commercials, everybody knows to expect on-time, friendly service from Southwest, but not a gourmet meal or hot towel service. Southwest's consistent delivery of its service promise has made it successful in a very challenging industry. You'll notice there is a strong keyword used when describing the service standards of each company: consistency. While Nordstrom and Southwest make different promises to their customers, they both rely on well-trained associates to consistently deliver on their promises.

In fact, it is the quality and consistency of interactions that customers have with associates that typically defines how they perceive their overall experience. This interaction can transform the customer experience from satisfying to outstanding. Research evaluating how customers assess the service experience suggests that the specific need motivating a purchase decision, the reliability of service provided and the physical environment all factor into establishing customer expectations and creating customer value. However, clues provided by associates about the level of service are most important in exceeding customer expectations (Berry, Wall and Carbone, 2006).

Not surprisingly, poor interaction with associates can have the opposite effect. A recent study conducted by faculty at the Wharton Business School found that disengaged sales associates were the biggest cause of retail customer dissatisfaction. The study found that 33 percent of customers were unable to find an associate to assist them and another 25 percent felt they were ignored by disengaged associates. While customers in the study were willing to tolerate issues like parking and out-of-stock merchandise, poor service by associates led to more lost business and bad word-of-mouth than any other aspect of the retail

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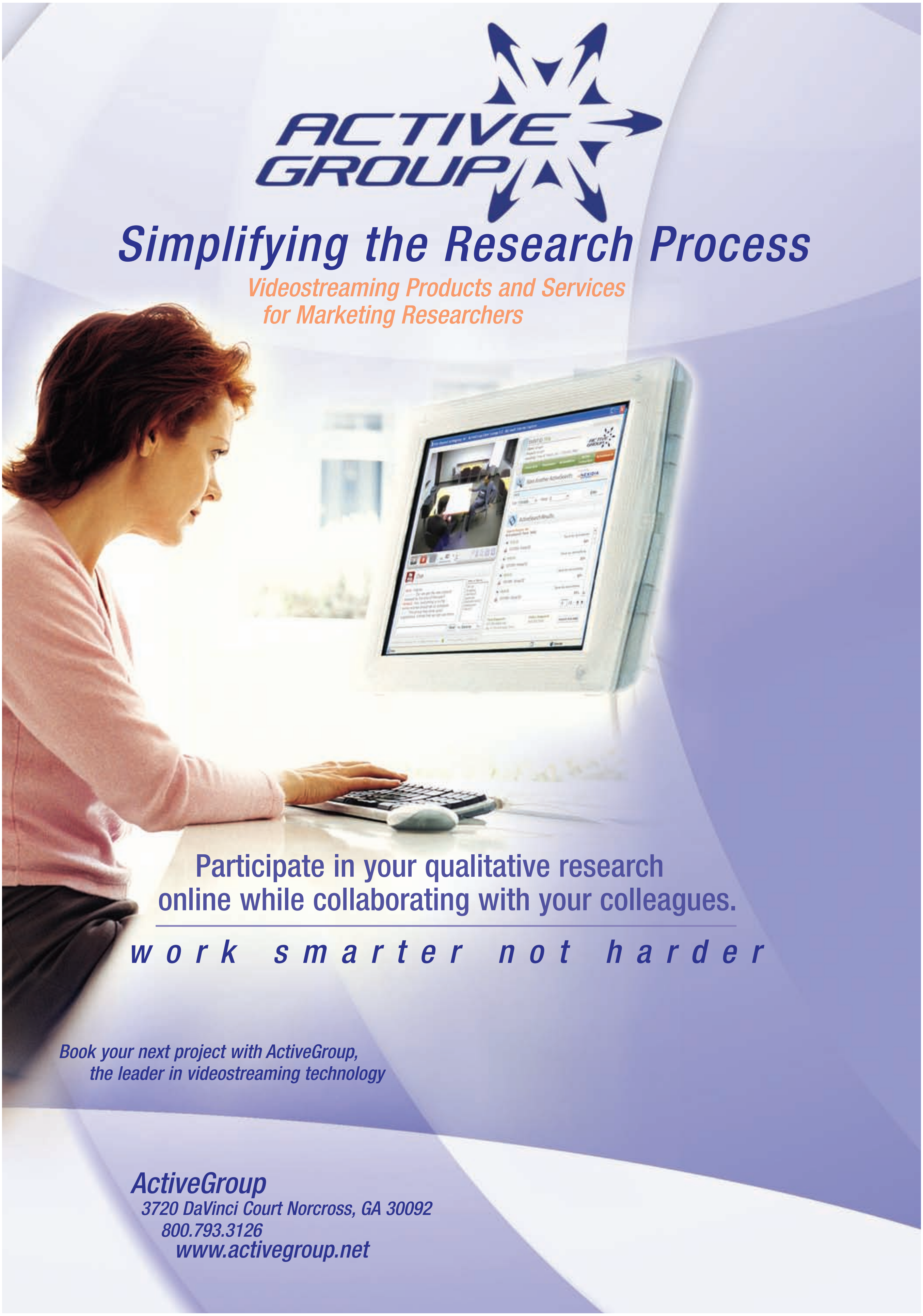
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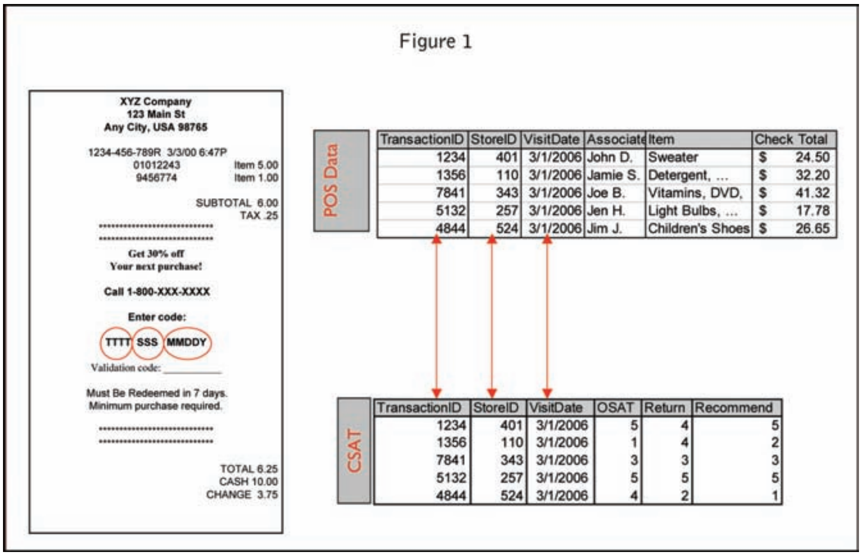


TransactionID	StoreID	VisitDate	Associate	Item	Check Total
1234	401	3/1/2006	John D.	Sweater	$ 24.50
1356	110	3/1/2006	Jamie S.	Detergent, ...	$ 32.20
7841	343	3/1/2006	Joe B.	Vitamins, DVD,	$ 41.32
5132	257	3/1/2006	Jen H.	Light Bulbs, ...	$ 17.78
4844	524	3/1/2006	Jim J.	Children's Shoes	$ 26.65

TransactionID	StoreID	VisitDate	OSAT	Return	Recommend
1234	401	3/1/2006	5	4	5
1356	110	3/1/2006	1	4	2
7841	343	3/1/2006	3	3	3
5132	257	3/1/2006	5	5	5
4844	524	3/1/2006	4	2	1

Customer satisfaction (CSAT) survey data is tied back to transaction information using the code entered from the POS-generated survey invitation (simplified illustration shown).

experience (Wharton Business School, 2007).

Certainly not all retailers should compete on service. Retailers need to balance the trade-offs between managing customer demands and operating efficiency (Frei, 2006). However, once retailers decide to differentiate themselves based on service, consistent execution of service behaviors by associates is critical. A well-designed customer satisfaction survey is an indispensable tool in monitoring how well associates are executing service behaviors and subsequently delivering on the brand's promise. A company that has a sustained commitment to competing on service can demonstrate that service behaviors not only lead to increased customer satisfaction but also drive incremental sales and increase customer loyalty in the long-term. They accomplish this by collecting and reviewing customer data captured at the point of sale (POS).

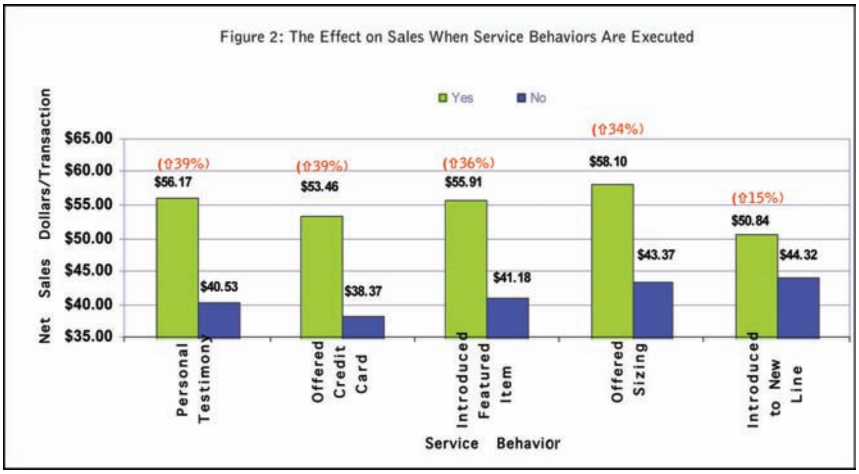
Dig deeper

To gain a true understanding of the customer experience we need to dig even deeper and investigate how the behaviors of sales associates directly affect the shopping behaviors of customers. If an associate interacts with a customer by telling them about products they've personally used, will that affect how much that customer spends in the store? Will it affect their likelihood to tell their friends and family about their experience? Will it make them come back sooner? Answering these questions takes more than just a customer satisfaction survey; it takes data gathered from several sources during the customer transaction.

Combining customer data from a variety of sources to improve decision-making is not a new concept. The opportunities available to market researchers due to lower data acquisition, storage and management costs have been discussed for years but have come to a head due to the recent popularity of *Competing on Analytics* (Davenport and Harris, 2007). The book illustrates some of the ways companies are using data to make strategic decisions. Point-of-sale data is one source of information about the customer's experience. Information on each customer transaction - date and time of visit, items purchased, amount spent, and even frequency of visit - are all gleaned from POS data. Tying this transactional information to customer service perceptions can help us evaluate the impact of associates' service behaviors.

There are a few requirements for combining customer survey and transactional data. First, customer survey invitations are generated from a POS system. Second, the invitation must include a survey code with enough information to uniquely identify the transaction - this may simply be a transaction number or it may be a combination of numbers including a store number, register number, date of transaction, etc. The data is then matched to all the information stored in the POS system including which items were purchased and total sale price (see Figure 1).

Start to understand



Average sales dollars per transaction increases dramatically when associates execute service behaviors. As shown here, behaviors performed by sales associates can increase sales up to 39 percent.

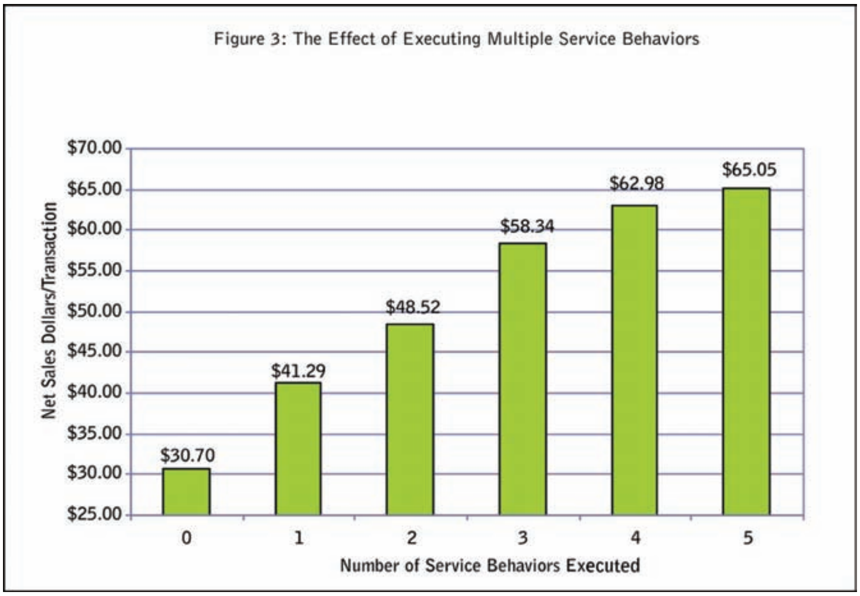
When we dig down to the individual transaction level, we can really start to understand how the service experience drives financial performance. Think back to an experience at Nordstrom or any retail store where you felt a genuine connection to the sales associate. Suddenly, instead of being sold merchandise, you find yourself working with an ally to find the items you are looking for. You may have come away from that experience spending more than you expected, yet you were also highly satisfied. As it turns out, you're not alone.

In this first example (Figure 2), we see a major retailer who has five steps in their service model. When a customer experiences any of the steps in the service model they will spend between 15 and 39 percent more than if they don't experience that particular service behavior. In this case, the strongest drivers of transaction value are offering the customer a credit card and the step that asks an associate to share their own experience about a product or service.

There's an even more powerful effect for this retailer, however, when they begin to combine the individual behaviors in the model to create an entire service experience. You can see in Figure 3 that the transaction value more than doubles, on average, between customers who do not experience any part of the service model and those who experience all five service behaviors. Clearly, it is critical for this retailer to make sure that every associate understands the service model and is able to execute all behaviors associated with it.

More not always better

We have seen that proper execution of service behaviors can positively



Executing multiple service standards has a cumulative effect on driving incremental sales.

impact sales immediately through increased retail purchases. However, executing more service behaviors may not always be better for the bottom line. Instead, the right behaviors at the right time may have a bigger impact. To illustrate, we need to look not only at incremental sales but also at customer conversion rates. Most retailers do not have the luxury of staffing budgets that would allow for 30-minute interactions with every customer who walks in the door. In addition to training associates to execute service behaviors, it is also important to teach them how to break away appropriately so that all customers receive assistance.

While creating the "ultimate" customer experience is great for many reasons, most retailers need to balance this with the need to touch multiple customers with a limited staff. The most effective way to achieve this balance is to prioritize service behaviors. Figure 4 shows conversion rates and average ticket amounts by the number of service behaviors executed. For this company, conversion is most impacted by getting the customer into the fitting room. The key is to maximize incremental sales with service behaviors without sacrificing conversion. Foundational behaviors that assist customers in getting into the fitting room need to be implemented and executed consistently before targeting additional behaviors that drive incremental sales.

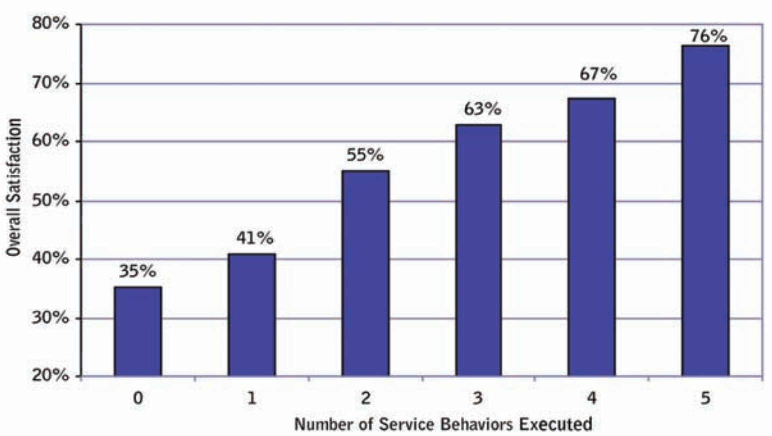
Immediate payoff

Figure 4: The Effect of Adding One Service Behavior on Conversion and Sales Dollars Per Transaction

Visited the Fitting Room		✔	✔	✔
Received Assistance in Fitting Room			✔	✔
Offered Additional Merchandise				✔
% of Customers Experiencing	75%	25%	19%	9%

Additional service behaviors increase average ticket sales, but adding just one single service behavior has the largest influence on conversion and sales dollars per transaction.

Figure 5: Service Behaviors Performed by Associates Drive Customer Satisfaction Ratings



These examples illustrate that there is an immediate payoff if companies can get their associates to create the kind of service experience they want. However, does the increased transaction value come at the cost of customer satisfaction and future purchases? Not necessarily. When we examine the link between service behaviors and customer satisfaction, we again find that the more service behaviors exhibited, the more likely customers are to be "highly satisfied" with their overall experience (see Figure 5).

According to *The Service Profit Chain* (Heskett, Sasser and Schlesinger, 1997), the more satisfied customers are, the more likely they are to be converted into loyal customers. Customer loyalty is operationalized on many satisfaction surveys as the customer's intention to return (repurchase) and the customer's intention to recommend (positive word-of-mouth). A consistent finding across all of the retailers we study is that customers who rate their overall satisfaction in the top box (highly satisfied) are much more likely to intend to return to a particular retail outlet or recommend that outlet to friends and family. A typical loyalty curve plots satisfaction scores against customers' loyalty intentions (see Figure 6). In this example, highly-satisfied customers are almost 25 percent more likely to indicate they are highly likely to return than merely satisfied customers and over 175 percent more likely than dissatisfied and highly-dissatisfied customers.

Because the difference between merely satisfied and highly satisfied customers impacts their loyalty intentions so strongly, service behaviors that can motivate customers to indicate they are highly satisfied will pay dividends in customer loyalty. But do intentions to return

Figure 6: Highly Satisfied Customers are More Likely to Intend to Repurchase

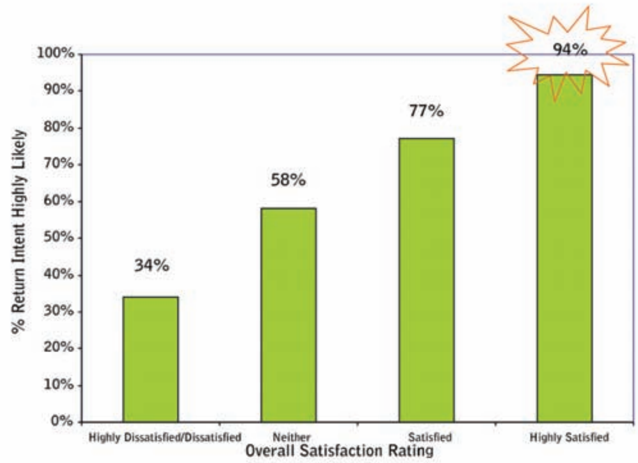
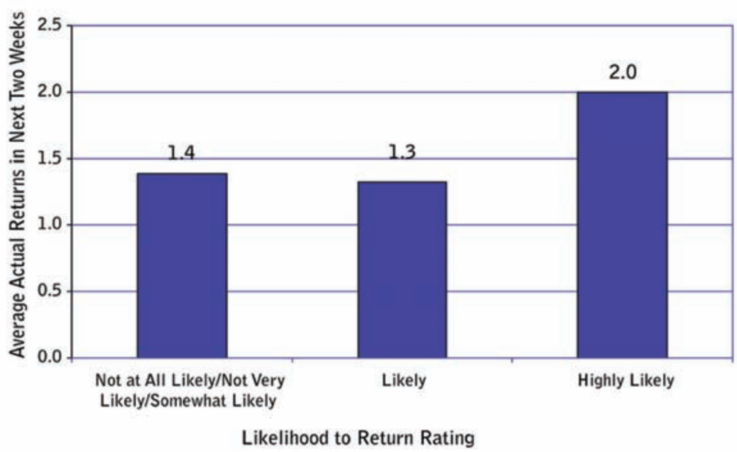


Figure 7: Customers Who Indicate They Are Highly Likely to Repurchase Return More Often



actually predict a customer's true likelihood to return? Again, transactional data can be used to find the answer. When aggregating intent to return to the unit level and examining the relationship with comp-sales, we have to contend with a lot of noise in our model. Differences in store-level characteristics like convenience of location, competition and store volume may affect the relationship between the average intentions of all customers to return and actual comp-sales numbers. Fortunately, transactional data allows us to examine a customer's intent to return in relation to whether he or she actually returned.

Figure 7 shows the relationship between a customer's intent to return and their actual likelihood of returning. We used transactional data that uniquely identified customers via loyalty card numbers to link survey results to actual return visits. On average, customers who said they were highly likely to return came back twice in the two weeks following the visit for which they took the survey. All other respondents returned, on average, less than 1.5 times. Although this difference may first appear small, getting customers to visit one additional time per month could have large impacts on sales growth. Clearly, customer intentions are distinct from their behaviors but transactional analyses allow us to link the relationship between the two. In the absence of behavioral data, customer intentions can be used successfully to evaluate the potential impact on comp-sales by increasing the likelihood that a customer will return.

Cut through the clutter

The service experience matters. We all fundamentally understand that, but proving it can be a challenge. Transactional level data allows us to cut through the clutter often associated with linking the store-level customer experience with store-level financial results. Transactional analysis demonstrates clearly that those customers who experience a well-developed service model and have genuine interaction with sales associates not only spend more but are more likely to come back again. Linking customer survey data to transactional data provides organizational decision makers with an opportunity to evaluate which service behaviors have the biggest impact on customer satisfaction, customer loyalty and financial performance for their brand. After the right behaviors have been identified, continuous measurement of customer service delivery through a well-designed customer satisfaction survey will ensure that consistent execution continues. | Q

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customer satisfaction research

Investing in advocacy

By Debra Dahab, Laura O'Gara and Julian Vermaas

As banks strive to build relationships, a national tracking study finds that good service is still key for customers

Ten years ago customer satisfaction was king. Today, the focus has changed to building "advocates" and the goal is to provide a WOW! customer experience in an effort to increase repeat business and word-of-mouth promotion.

One industry that has done an impressive job of stepping up to the customer experience plate is retail banking. Today, several of the nation's largest banks have entire departments devoted to providing an excellent customer experience. Many are spending tens of thousands of dollars to be considered for the Malcolm Baldrige National Quality Award, which has specific criteria based on customer knowledge, service and outcomes.

So how successful have these customer-focused efforts been? That question was the impetus behind a national survey of banking consumers conducted by the MSR Group, an Omaha research company.

Initiated in the fourth quarter of 2006, the rolling tracking study queries bank customers about their willingness to recommend and repurchase along with their use and quality evaluation of various banking services. The data are refreshed quarterly to ensure timely comparisons. An equal number of surveys are conducted within each of the four quadrants of the U.S. as defined by the U.S. Census Bureau (West, Midwest, South and Northeast). The study employs a random-digit dialing technique. Respondents are screened to be at least 18 years of age and they must have utilized their bank within the previous 30 days for at least one of the following transaction types: branch visit, ATM, Internet or call center.

Positive news

The positive news is that the study shows nearly 65 percent of U.S. consumers are advocates of their bank. (In the study, advocates are defined as customers who are in the top box for both willingness to recommend and intent to open additional accounts [repurchase].) Looking just at this group of customers, it is easy to see their value: a full 88 percent have told someone something positive about their bank.

But advocacy is just an end result. Getting there is the real challenge for banks. To build advocates, retail banking institutions must have a

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clear picture of their customer base and how that fits into the competitive landscape.

Examining the specific areas of advocacy, service quality and service recovery may uncover an opportunity for those banks willing to understand how they compare to the competition. Armed with knowledge of the particular needs of their customers, they can develop initiatives around those needs.

True advocates

Much of the MSR Group's industry research aims to differentiate true "advocates" from self-reported "promoters" (see Fred Reichheld's book *The Ultimate Question* for a more complete description of promoters). Based on data gathered from the MSR Group's 2007 APECS client studies, the company found that combining responses to the "willingness to recommend" (the only factor required to be a promoter) with "willingness to open additional accounts" enhanced the predictability that a customer would be engaged enough to actually begin the desired word-of-mouth promotion cycle.

In the national study, a net advocacy rating (NAR) is computed by subtracting the percentage of at-risk and critical customers from the advocates. (Critical customers are those who are somewhat or very unlikely to recommend and repurchase. At-risk customers fall into the "may or may not" response category or "somewhat unlikely," while loyal customers are those whose responses are mixed between at least one "very likely" or both "somewhat likely" response categories.)

The NAR for 2006 and 2007 is shown in Table 1. While the national NAR has not changed significantly since the beginning of the study, looking at changes within customer segments provides both good and bad news: the percentage of loyal customers has increased, while the percentage of both advocates and at-risk customers has decreased. Monitoring changes within their customer segments helps banks evaluate and identify strategies to improve their NAR.

Table 1: 2006, 2007 Advocacy Segments Based on Branch Office Evaluation

	2006 (n=1,021)	2007 (n=1,200)
Advocates	67.2%	64.8%
Loyal	18.1%	21.9%
At-Risk	10.0%	8.5%
Critical	4.7%	4.8%
Net Advocacy Rating (NAR)	52.5	51.6

Talked about service quality

The relationship between advocacy and service quality is clear: nearly two out of three advocates who told someone about their bank talked about service quality. In general, U.S. consumers consider interactions at the branch and on the Internet to provide the highest quality of service, while ATM and call-center interactions are considered to provide lower levels of service. However, between fourth-quarter 2006 and second-quarter 2007, service quality ratings declined for all service delivery points with the exception of call centers.

Branch quality ratings decreased from an index of 87.2 to 86.6 in just six months, while satisfaction with ATMs fell from 82.9 to 80.4 in that same time frame. (The satisfaction index is the mean of summed ratings of service attributes. The highest possible index score is 100; the lowest is 0.) Nationally, diminished levels of satisfaction with ATM services have been driven by declines in ratings for convenience of location, safety and security and adequate supplies of envelopes and pens. More than half of all U.S. consumers are using ATMs, with 53 percent of respondents reporting having used an ATM at least once within the previous three months.

Online service quality ratings declined from an index of 87.3 in first-quarter 2007 to 85.6 by the second quarter. At the same time, the percentage of consumers reporting that they had used a bank Internet site to monitor account balances, transfer funds and for other account activities jumped from approximately 32 percent to 37 percent.

Online ease-of-use ratings dropped 4.1 index points. With more consumers migrating to online banking services the result is a higher percentage of customers who lack online experience. As these consumers work their way through the natural learning curve, future results may show a turnaround in ease-of-use ratings. However, having user-friendly sites will become even more critical as more new users test the online banking option.

Although rated the lowest of all service delivery points, satisfaction with call-center service has remained fairly steady, running between 80.9 and 81.7.

Margaret Moog, senior vice president and head of customer service for HSBC Bank USA, Buffalo, N.Y., believes the national comparative norms provided by the study benefit customers and offer banks an opportunity to differentiate themselves from their competitors. "National norms provide benchmarks to gauge how well HSBC is doing against its competition. By comparing results, we can identify areas of opportunity and focus our efforts on understanding differences which ultimately allow us to improve the customer experience," she says.

Clarify the need

While national information provides an industry barometer, regional differences clarify the need for banks with branches in multiple areas of the country to have region-specific strategies for everything from the way employees interact with customers to the

marketing of specific services.

Customers in the Midwest and South are most satisfied with branch services, giving index ratings of 88.1 and 87.4 respectively. Customers in the West are the least satisfied, having an index rating of only 85.3. Consumers in the Northeast fall closest to the national average with an index rating of 86.1.

Usage differs regionally as well. In the Midwest, ATM usage jumped from 46.9 percent in fourth-quarter 2006 to 55.3 percent by second-quarter 2007.

At Bank of the West, with headquarters in San Francisco and nearly 700 branches across the country, the regional comparisons have been useful. "We have a very diverse customer base. Everything from large cities in California to Midwestern hometowns with a population of 1,000," says Susan Strong, vice president of sales and service at Bank of the West. "Seeing how the ratings differ around the country has been very useful in understanding our markets and in working with our branches across the United States."

A challenge

Promoting new services in a way that is meaningful to customers is a challenge for many banks. Bank of the West's Strong notes that, while it can be difficult, her organization has begun an initiative to do just that. "We have our bankers asking questions of our customers to understand their specific needs - both present and future - and then offering products that will meet those needs. It is interesting to see how our employees are doing overall compared to our competition," she says.

Nationally, bank employees have stepped up their cross-selling efforts over the last six months. Twenty-two percent of customers surveyed in the second quarter of 2007 report that branch employees recommended additional products and services during their branch visit, compared with 14 percent in the fourth quarter of 2006.

Since beginning its cross-sell initiative, Bank of the West has experienced steady growth in the number of customers reporting that an employee had recommended additional products or services beyond the customer's original inquiry. If its increases continue at their current rate, Bank of the West's cross-selling scores will exceed the national average by third-quarter 2007.

Table 2: Satisfaction with Problem Resolution by Customer Category

	Advocates	Loyal	At-Risk	Critical
% Experiencing a Problem	6.3%	24.5%	34.0%	46.4%
% "Very Satisfied" with Resolution	75.0%	44.4%	37.5%	0.0%

Problems bound to occur

In spite of a bank's best efforts to provide an excellent customer experience through expanded conveniences and personalized service, problems are still bound to occur.

How a bank responds to a customer calling with a problem or issue affects the customer experience in two ways. First, advocates are less likely to call with a problem or issue, so identifying and then reducing the incidence of problems and issues is one strategy. Second, the level of satisfaction with the outcome of the experience influences a customer's willingness to recommend and repurchase.

Nationally, 14.5 percent of customers experienced a problem with their bank in the last 12 months. Problems relating to fees and charges on their account were most often mentioned (20 percent of respondents), 11 percent said staff or statement error and 10 percent cited bank policies and procedures.

In general, it appears that banks are doing a good job of responding to customer concerns: 69 percent of those who experienced a problem report that it was resolved. Banks in the Northeast tend to have higher rates of problem resolution, with 90 percent of customers reporting that their problem had been resolved.

The way a bank resolves a problem does impact the future relationship between it and the customer (Table 2). Seventy-five percent of advocates who called with a problem said they were very satisfied with the way it was resolved compared to 37.5 percent of those in the at-risk segment and none of the criticals.

While customers who never experience a problem have the greatest loyalty, banks can still make up for some of the resultant loss of goodwill by seeking resolution that, to the extent possible, is acceptable to the customer and by providing a stellar service experience.

Service ranks highest

In addition to providing insight to how the U.S. consumer judges his or her bank, this study also tested how specific attributes figure into the initial selection of a bank. Based on the overwhelming impact of service on a positive banking relationship, it comes as no surprise that among the tested attributes, providing "loyal, old-fashioned service" ranks highest in importance to customers when choosing a bank. What may be somewhat surprising is that a bank that "gives back to the community" ranks second while one that is "conservative and has a strong financial history" ranks third in importance.

Banks that make an organization-wide commitment to providing great service, have systems and processes in place to follow up immediately on customer concerns and that never lose sight of the need to continually cross-sell to the needs of their customers will thrive in the competitive retail banking environment. | Q

customer satisfaction research

What is the value of engagement?

By Frank Mulhern
and Robert Passikoff

Study examines the link between hotel employee performance and guest satisfaction

This article aims to prove that employee engagement – and employees' abilities to align their attitudes and behaviors with guest expectations – is becoming the experiential first contact touchpoint that can differentiate one hotel from another and increase profitability. The link between predictive guest value drivers and employee engagement can identify the financial value of implementing internal programs to change employee behaviors. We will show how management can more strategically sequence initiatives that address experiential touchpoints and quantify what financial value will be derived from increased levels of employee engagement in select touchpoint activities.

As all researchers understand the difficulty in gaining access to actual sales data in this (or virtually any other) category, in a rare instance, actual guest financial and behavioral data was made available for this survey by an international hospitality brand. As such, the article proves this approach can be practically applied, can accommodate a large number of variables and can provide the leisure industry with a way to consider return-on-investment measures in corporate decision-making regarding the most time- and cost-effective way to manage the guest experience.

This project utilized a three-step integrated marketing assessment to identify:

- guest values and expectations as they relate to specific marketing, brand and experience issues in the leisure industry;
- the relationship between employee engagement and behavior to guest values and expectations; and
- the financial value that will result from changes in levels of employee engagement and actual behavior as they relate to managing the leisure experience.

Identify value drivers

The methodological framework utilized 1) "emotional bonding" engagement assessments to identify guest value drivers and the degree of alignment that exists between what a guest wants and to what degree employees are engaged with these desires, and 2) a financial analysis that relates the identified value drivers with actual guest visi-

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tation and spending behavior.

The research was conducted in three regions of the United States, in six hotels (three business hotels and three leisure hotels). Interviews were conducted among guests, where names were provided by the international hospitality brand of guests who had stayed in each hotel within the past three months, and front-desk/lobby personnel to identify and quantify the:

• drivers of guest loyalty and value;

• percent-of-contribution that 28 hotel process items made to engagement, loyalty and profitability;

• order of importance of the value drivers of guest loyalty (which describe how the guest views the category, compares offerings, and, ultimately, becomes a loyal guest);

• expectations held for each of the loyalty drivers; and

• the financial impact on income flows from guests and prospects that changes in employee engagement and behavior will bring about.

The study also measured the degree to which employee engagement with the 28 process activities aligned with items that drive guest loyalty, but those findings go beyond the scope of this article.

Telephone interviews were conducted with 353 guests and 100 employees. Given the lack of meaningful brand differentiation for virtually every brand in every product and service category, 70 percent (maybe more in some categories) of the decision to become engaged with a brand, i.e., act positively toward a brand, is emotionally-based. That is why rational, direct Q&A-derived assessments alone, i.e., "how satisfied were you with your stay" questions, lack the ability to identify real engagement effects. Certainly, to know you is not (necessarily) to be engaged with you.

Based upon the reality of this 70:30/emotional-rational engagement ratio, Brand Keys developed engagement assessments that are a combination of psychological inquiry, direct inquiry and higher-order statistical analyses. This approach is designed to allow marketers to predictively identify and measure emotional and rational sources of brand loyalty and engagement.

The engagement algorithm identifies the top four drivers of loyalty and engagement. It also identifies how category and consumer attributes, benefits, and values - in this case 28 front-desk/lobby process items - come together to form the component "parts" of those drivers. Additionally, the assessment output calculates the individual percent-of-contribution each makes to the driver, and therefore, loyalty and engagement.

These data allow for a two-stage analysis:

1. The identification of the loyalty drivers that "describe" what guests want from the check-in/lobby experience.

2. How the guest values related to financial outcomes.

Same four drivers

Three critical findings emerged from the data:

1. Regardless of whether the hotel was primarily business or primarily leisure, the same four drivers of hotel value emerged among the sample of guests interviewed, in the same order of importance.

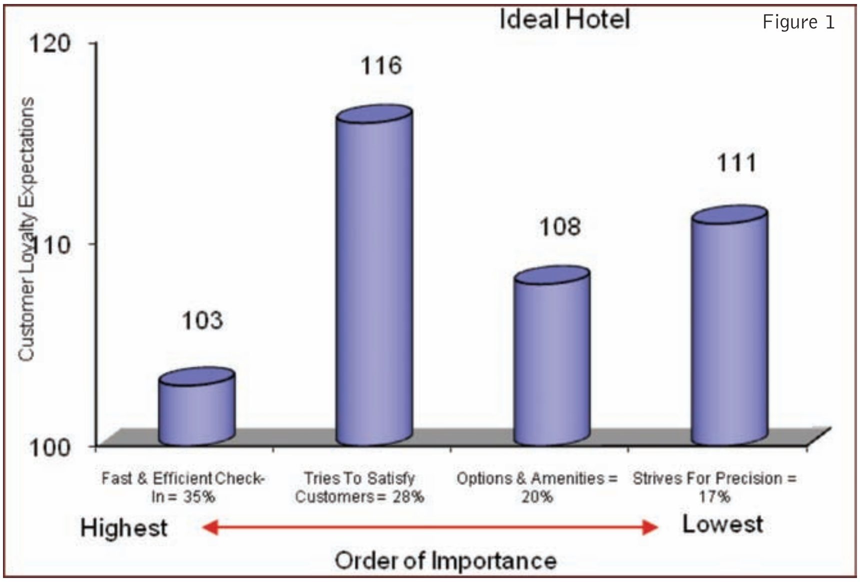

Figure 1

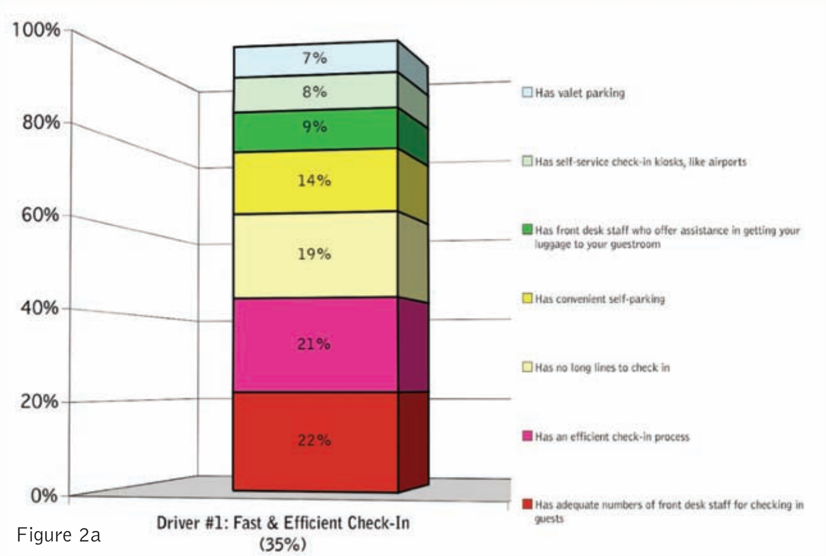

Figure 2a

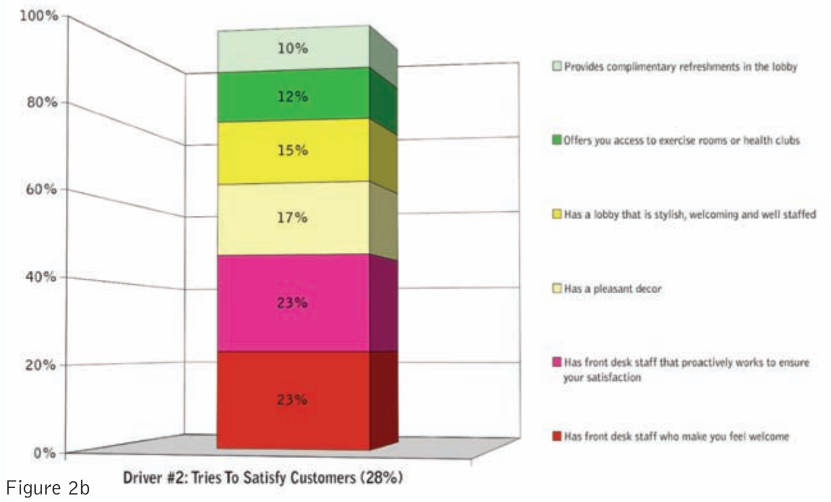

Figure 2b

2. The four loyalty drivers were given their names based upon an examination of their attribute, benefit and value components: fast and efficient check-in; tries to satisfy customers; options and amenities; strives for precision.

3. From an employee standpoint, there is a lack of consistent similarity in the order of hotel value driver importance from one venue to another, or from one individual hotel to another. But again, this issue is beyond the scope of this article.

Category loyalty drivers for the ideal hotel are shown in Figure 1.

The individual loyalty drivers, their component attributes, benefits, and values, and the percent-of-contribution each item makes to profitability are shown in Figures 2a-d.

Once these factors had been identified and quantified, a statistical analysis to connect the loyalty drivers to guest visitation and spending behavior was conducted.

Table 1

2003-2005	Mean	Std. Dev	Min	Max
Total Spend	$869	$997	$62	$10,633
Total Visits	1.2	1.2	1	17
Total Nights	3.3	5.9	1	70
Spend Per Visit	$724	$679	$62	$5,141

The guest data that was provided by the international hospitality brand covered the three-year period from 2003 through 2005.

Four aspects of the guest behavior were evaluated (total spending; total number of visits; total nights spent; and spending per visit), with the overall findings as shown in Table 1.

The predictive model developed for this project explains the different levels of visitation and spending behavior as a function of the four loyalty drivers. As such, the model measures the link between the psychological (rational and predictive) drivers and the four metrics of guest behavior using a variety of statistical approaches, linear and nonlinear, to adjust for what turned out to be skewed spending levels among the sample of guests interviewed.

Results of the predictive modeling and financial analysis were as follows (Table 2):

- Of the four loyalty drivers, only one – "tries to satisfy customers" - was a significant determinant of total spending dollars, with a coefficient of 2.27. This means that a 10 percent increase in a customer's score on that driver will yield a 22.7 percent higher level of spending.
- Of the four loyalty drivers, "tries to satisfy customers" was also a significant determinant of total spending per visit, with a coefficient of 2.03. Here, a 1 percent increase would yield a 20.3 percent increase in spending per visit.
- As might have been expected, the number of visits to the hotel and the number of nights stayed at the hotel were not affected by any of the four loyalty drivers, as the need to travel and the time spent on a business trip or vacation are entirely outside of the control or influence of the hotel venue or process itself.

Build loyalty

The methodologies employed in this study confirm that employee engagement and behavior is linked to guest expectations and that potential "future value" created by better managing the guest experience can be calculated. By doing so, hospitality

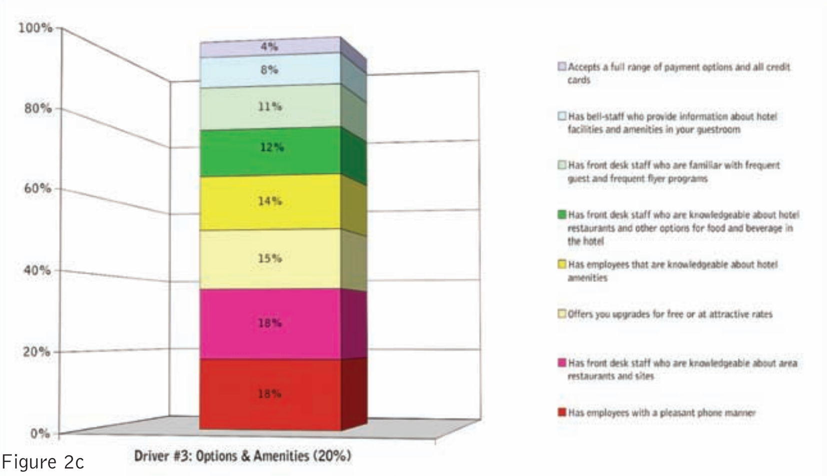

Figure 2c

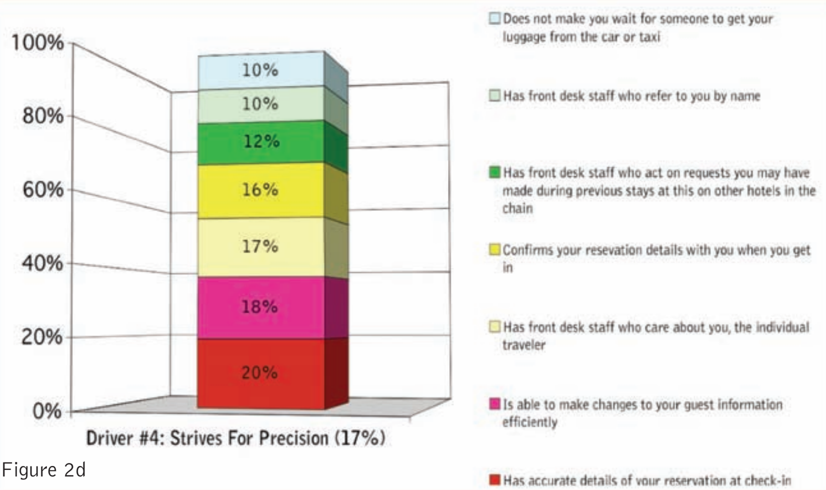

Figure 2d

brands can identify the kinds of experiential components required to build loyalty and profitability.

This approach shows that employee engagement – and employees' abilities to align their attitudes and behaviors with guest expectations – is the experiential first contact touchpoint that can profitably differentiate one hotel from another and can finally link guest loyalty drivers to employee engagement.

By identifying the financial value of employing internal programs to change employee behaviors, the approach provides a practical way to consider return-on-investment measures in corporate planning situations, allowing management to more strategically sequence initiatives that address experiential touchpoints by quantifying what

Table 2: Comparison Across Spending Groups - Mean Scores

2003-2005	Fast & Efficient	Tries To Satisfy	Options & Amenities	Strives For Precision
Top 20%	105.0	113.5	104.8	98.7
Bottom 80%	103.7	107.8	103.2	101.2
Top 33%	104.3	111.8	104.3	99.2
Middle 33%	104.7	107.7	103.6	102.0
Bottom 33%	102.9	107.8	102.6	100.8

Four indicators, one goal

A method for taking analysis of segmentation studies beyond gut instinct

By Brian F. Blake
and Bridget A. Durica

Tom feels as though he is teetering on the edge of a very high cliff. A hypothetical market researcher working for a manufacturer of kitchen appliances, he has encountered a problem that plays out again and again among marketing researchers and product managers around the country. To obtain a clear picture of the current and potential customers for the firm's market line, Tom worked with an outside research vendor to conduct an in-depth market segmentation. The portrait of each consumer segment that emerged was truly multifaceted, incorporating demographics, purchasing patterns, attitudes toward the product class, etc.

Now it is time to prioritize the segments and to select segments with the best sales potential for targeted marketing programs. Belatedly, it dawns on Tom that he may be in a bind.

He needs a set of straightforward indicators to identify the segments with the most sales potential. He senses that without these indicators, the product managers and other executives in the company who are his internal clients will become bogged down in the swamp of facts and figures pertaining to each segment. He is concerned that this information overload will drive them to base target selection decisions on simplistic subjective reasoning ("My gut instincts tell me…"). Tom fears that with all the data they may lose track of the basic targeting question: Where is the sales potential likely to be?

Tom knows that he can turn to academic researchers for quantitative procedures to target segments. He feels certain that, as a group, these techniques would incorporate a wide range of factors and would provide a wealth of insights. Yet he finds many of them to be too complex to understand, too dependent upon statistical packages he rarely uses or may not even have available, and/or requiring the investment of substantial time in dredging up data on profit margins, national sales figures and other types of internal data. Further, he suspects that he will not be able to communicate these fairly complicated ideas to his manager clients.

Worst of all, he fears that with all the complexity built into the selection procedure, his managers may still lose track of the fundamental question of which segments have the best sales potential. The vendor Tom was working with had offered to use its proprietary analytic technique, but judging from the vendor's statements, Tom feels that the technique is something of a black box ("I can't describe the step-by-step mathematical

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procedures, but it works. Trust me!"). And Tom is not about to trust the project to an analytic tool he doesn't thoroughly understand!

To further complicate matters, he anticipates that he will play a prime role in meetings with product managers focused upon turning the segmentation study into marketing action. In those meetings he will be asked numerous what-if questions, such as, "Would we be more successful if we targeted Segments A and B jointly and downplayed Segment C, or if we went after Segments A and C solely?" In these meetings he could well be asked about scenarios that he had not previously analyzed. He would then have to make targeting assessments on the fly and would have to recalculate the indicators quickly and confidently on the spot.

Tom needs a set of targeting indicators that: 1) uses only a few numbers; 2) can be readily calculated by the working practitioner; 3) is easily communicated to non-researchers; 4) is objective; 5) can validly flag the segments with greater sales potential; and 6) involves little or no extra cost for the firm.

Table 1

Segment	Data		Indicators			
	Cases	Highs	Size	Hit Rate	Return	Coverage
Convenience Firsts	190	57	19%	30%	5.7%	32%
Prestige-Conscious	130	52	13	40	5.2	29
Bargain Hunters	310	31	31	10	3.1	17
Quality-Insistent	150	15	15	10	1.5	8
Joy of Cooking	220	24	22	11	2.4	13
Total	1,000	179	100%	--	17.9%	100%

Keep it simple

He decides to follow the KISS rule (Keep it simple, stupid!). He looks around for a straightforward procedure that he (not just the vendor) can calculate and still get the job done efficiently.

Let's consider a set of four related indicators - size, hit rate, return and coverage - that Tom might consider using, either alone or in combination with more exhaustive procedures (such as the technique proffered by Tom's vendor). As a set, these indicators meet all six criteria Tom is seeking. In fact, the first two indicators (size and hit rate) are now widely used by practitioners, but the last two (return and coverage) are actually more generally useful.

The survey instrument Tom and his vendor used to develop the segmentation contained, among other things: a) "definitional" variables to identify the segments (e.g., a consumer's purchasing tendencies, appliance feature preferences); and b) "targeting" variables in-

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dicating the likely sales potential of an individual respondent (e.g., number of the company's appliances purchased, readiness to purchase the firm's brand). The survey was administered to a cross-sectional sample of 1,000 respondents screened for potential purchase of home appliances.

Grouping procedures yielded five segments: Convenience Firsts, Prestige-Conscious, Bargain Hunters, Quality-Insistent and Joy of Cooking. Each respondent's scores on the sales potential variables were integrated into a single dichotomous score (high-low). High potential reflected a level of sales potential adequate to justify the firm's attempting to attract a given consumer to its line (e.g., the consumer has purchased more than one of the firm's products in the last year and also intends to consider the firm's product line in the next appliance purchase). A total of 179 of the 1,000 respondents were judged to have high value. Table 1 shows the number of respondents ("cases") and the number of persons with high sales potential ("highs") in each segment. These are the data points from which the four indicators are constructed.

These indicators are used as a set to select segments; each fills in a different piece of the targeting puzzle.

• Size is the proportion of the market found in a segment, estimated by the percent of the sample respondents found in each group. Here, 190 respondents (19 percent of the sample) fall into the Convenience First segment.

Size is widely used by some managers ("Let's go after the largest segment!"). But this indicator has an obvious Achilles' heel. It can be misleading when there are great differences among the segments in their readiness to purchase a given firm's products. A segment may have a large number of consumers, but they may be the wrong consumers! In our example, the Bargain Hunters segment has by far the largest number of consumers (310), but fairly few of them (31) are ready to buy Tom's products. In fact, for this reason, the two prime indicators, return and coverage, show the Bargain Hunters to be middle-of-the-pack in targetability.

• Hit rate is the estimated probability of a segment member purchasing the firm's product. It is calculated as the proportion of respondents assigned to a segment that has high value. Here, of the 190 Convenience Firsts, 57 or 30 percent have a high value score.

Hit rate is also widely requested by managers ("Where can I find consumers most likely to buy my products?"). This indicator is especially valuable when the cost of each sales contact is fairly high, e.g., when sales depend on direct contacts by sales representatives. In such a case, the number of non-productive sales contacts must be kept to a minimum. On the other hand, when making a fairly large number of unproductive sales contacts does not involve a major cost penalty (e.g., when sales are generated through mass media ads), hit rate is less informative. We can see in our example that the Prestige-Conscious segment provides the highest hit rate (40 percent).

On the down side, hit rate can be misleading when applied to small segments. A segment can have a high hit rate, but still not command enough high-value consumers to be profitable. Here, for example, the Prestige-Conscious segment has the highest hit rate but does not have the highest number of valued consumers.

• Return is a relative index of the sales potential which a segment is likely to deliver to the firm. It is estimated as a product of the segment's size and hit rate. For the Convenience Firsts, this would be 30 percent of 19 percent, or 5.7 percent. It may also be calculated quickly as the percentage of the sample (here, 1,000 cases) that both falls into a given segment and also has high value (57 for Convenience Firsts).

Return is perhaps the most valuable of the four indicators for general use, as it incorporates the benefits of both size and hit rate. Of the four, it is the single best guide to how many customers might be expected to be delivered from each segment. Return does not have either of the shortcomings noted for size and hit rate.

• Coverage is a segment's share of the total sales potential found in that market. It is gauged by the proportion of those with high value found in each segment. For Convenience Firsts, that would be 57 of the 179, or 32 percent. It can be roughly translated as how much of the expected sales in that market is commanded by a particular segment.

While it is mathematically the flip side of return, coverage is an easy-to-read index when targeting multiple segments. It reflects how much business may be "left on the table" after one's targeting choices. Here, our targeting Convenience Firsts addresses 32 percent of the valued customers, but leaves 68 percent of the likely buyers unaddressed. If it were possible to simultaneously target both Convenience Firsts and the Prestige-Conscious, Tom's firm would focus upon fully 61 percent of the likely customers, the backbone of the sales found in that market.

Workable guide

While more elaborate approaches to assessing targetability are available, these four indicators provide a workable guide to target selection that can spot where the sales potential can be found, is quick to calculate, and is easy to communicate. Further, given that they do not require any additional analyses or consultation costs, these four truly shine for those "quickie" segmentation projects with a limited budget and a tight time frame.

Interestingly, this set of indicators has salvaged a project on more than one occasion in the first author's 30+ years of experience. In those instances, a technically more elaborate targeting procedure was used but it "blew up" due to missing data. The four-indicator set fortunately provided a fall-back option.

Even when used in conjunction with more elaborate targeting procedures, it has consistently resonated with manager clients. It gets the job done. | Q tracking research

Ongoing maintenance required

Best practices in implementing a tracking program

By Jamie Baker-Prewitt

Business managers use data to reduce the risk of making bad or flawed decisions. As providers of data, information and recommendations for action, survey researchers must ensure the validity and reliability the decision support they provide to managers, particularly when managers use the information to make decisions about how precious resources are expended. A common example of such decision support comes from what researchers call "trackers," or programs of research aimed at periodic and sometimes continuous measurement and reporting of consumers' attitudes and behaviors.

Approximately 32 percent of the revenue from online research conducted by U.S. marketing research firms in 2006 consists of tracking studies[1]. While they vary in design and usage, all of this research is intended to inform important managerial decisions spanning various elements of marketing and organizational actions. Despite the obvious impact of trackers on whether companies achieve their business objectives, little published material exists on critical success factors for tracking research.

Differing objectives and marketplace characteristic should dictate how tracking programs are designed, but some best practices should be ubiquitous. As a provider of survey research and industry education, and as a research company with experience with tracking research, Burke offers the following set of critical success factors for designing and implementing actionable tracking programs.

• Make decisions about measurement frequency based on the nature of the information being measured and the speed with which information users can use findings to make decisions. In order to connect advertising investments to brand and advertising awareness, ad expenditures by week and media outlet are juxtaposed with weekly awareness levels in the marketplace. In this and similar cases, frequent measurement and reporting best informs business decisions for the firm. However, other situations call for less frequent measurement. For example, monitoring relational customer loyalty often requires less frequent measurement because managerial actions take longer to implement. Subsequent changes in performance and opportunities for customers to experience the change require more time, so semi-annual or annual measurement might be most appropriate. In sum, selecting the right interval between measurements

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will help to optimize how research dollars are allocated.

• Choose sample sizes that ensure appropriate precision levels. High levels of statistical precision mean that the estimates provided to business managers have enough statistical precision to detect changes over time. Furthermore, in situations where a few percentage points make a big difference to high-stakes decisions, tracking studies must include high precision levels (e.g., +/-3 percentage points). An example of such a situation would be the use of a customer loyalty measure to determine whether managers receive bonuses. However, other situations require less precision because the stakes are not as high, and managers only need to understand general patterns; some general brand awareness and usage trackers might fall into this category. Because precision levels are partially driven by sample size, and data collection tends to be the costliest phase of survey research, researchers should select precision levels that are appropriate in each particular business situation.

• Keep the survey focused on the information business managers need in order to make good decisions. Invariably, researchers are pressured to include in tracking surveys quite elaborate and often redundant attribute batteries, along with exhaustive sets of questions only loosely related to the core objectives of the measurement program. Even when they are launched with few or no extraneous questions, “nice to know” survey items tend to be added, causing respondents to endure lengthy, often meandering surveys. Such surveys can lower response rates and also produce data generated by bored, frustrated respondents who become mindless midway through the survey. By keeping the survey focused on the main business objectives and related decisions to be made, researchers enhance the quality of the information obtained and reported from tracking programs.

• Use statistical significance testing appropriately. Because technology enabled it long ago, researchers sometimes cannot resist the urge to test every measure against itself during the previously reported measurement period. In reality, this misstep often produces reams of significant differences, some reflecting true change and some reflecting an annoying byproduct of significance testing: the occurrence of spuriously significant differences that reflect no true population differences (in this case changes over time). With a 90 percent confidence level, 10 percent of significant differences are not true differences in the population. However, superior significance testing practices do exist and should be followed for trackers. First, perform omnibus tests (e.g., ANOVA, MANOVA) to determine whether overall change is present – that is, change across a set of measures such as brand image ratings. Second, consider adjusting confidence levels to account for

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family-wise error rates. The appropriate adjustments are dictated by whether the significance tests were planned or not and the degree of overlap within the set of tests performed. However, simply using, for example, a 95 percent confidence level rather than a 90 percent confidence level would reduce the incidence of spurious significant differences. Finally, make significance testing hypothesis-driven; do not simply "compare everything to everything" to see if some comparison will "pop." By definition, one will, but it might not be a result that is meaningful in the marketplace.

• Interpret findings in conjunction with relevant organizational initiatives. Most organizations have at a minimum six to eight internal initiatives going on at any given time. For example, a company might invest in a six-month training program designed to enhance the use of a new CRM system. Another initiative might focus on implementing large-scale advertising campaigns with tie-ins to local community events. In addition, major clients might be invited to company headquarters for the unveiling of a new product line. While these activities might seem unconnected to results reported from tracking programs, each of them could have an impact on how the tracking information is interpreted. Therefore, researchers and end users alike must interpret tracking data within the broader organizational context.

• Interpret findings within the broader competitive and environmental context. No organization operates in a vacuum. Actions by competitors and the emergence of new competitors change how companies should allocate resources. For some industries, government regulations create boundaries within which organizations reach and serve customers. Furthermore, economic and sociopolitical trends change how consumers are influenced and, ultimately, the choices that they make. Without knowledge of the environmental context of findings from tracking programs, researchers and business managers will likely misattribute shifts in items like brand awareness, customer loyalty and satisfaction with transactions. While many reports from tracking programs include little or none of this broad environmental information, such context is necessary for proper interpretation of data from trackers.

• Weigh the value of changes to sample frame, survey item wording, scaling, etc., against the loss of comparability to previous measurement waves. For nearly every survey-based tracking program, there comes a time when information users desire a change in the measurement system. For some organizations, the content and structure of the survey instrument, for example, might be in a state of nearly continual change. Legitimate causes for the requested changes often exist, such as shifts in business strategy, changes in the competitive landscape for the business, and changes to improve alignment between survey data and other operational or financial data. However, modifications are sometimes requested for more trivial reasons such as a new information user having preference for a seven-point rather than a five-point scale to measure the believability of an ad. Simply put, most methodological changes reduce comparability of data across measurement periods. This reduced comparability decreases one's ability to determine whether change over time reflects true change or whether change is merely a product of the changes in methods. While political considerations drive some research design changes, and while some methodological changes can be "adjusted out" analytically in part through parallel testing, the value of each change must be weighed against the loss of comparability in interpreting data patterns over time.

• Fully understand how findings from the tracker will be used within the organization. Tracking programs that truly shape a company's strategy and tactics start with the end in mind. That is, how information will be distributed and used must be established early and used to make research design decisions, specifically those related to sampling, survey construction and data analysis and reporting. Early qualitative research allows researchers to hear what business managers need from tracking programs in order to improve the quality of their marketing and operational decisions. In addition, actually shadowing one or more information users can allow researchers to understand how tracking research results can be used to improve how companies operate. Thus, while the methods differ across situations, researchers must understand how decision makers and decision influencers use tracking information to achieve their business objectives.

• Hold periodic program reviews. To the extent that daily management of tracking programs involves many discrete activities and many individual changes to the design, it sometimes becomes difficult to envision the broader purpose of the research. In addition, different client contacts and information users have different ways of operating, and shifts in personnel often require rearranging priorities and changing communication approaches. Accordingly, stakeholders should hold periodic program reviews wherein researchers, decision influencers and decision makers jointly evaluate various elements of the tracking program. Topics for review can include core design components, as well as the "softer" aspects of implementing large-scale survey research. These softer aspects can include how results are positioned, how and when project team members communicate and the overall health of the professional relationships among project team members. Holding a program review annually can be a worthwhile investment to ensure the success of survey-based tracking programs.

Not that simple

At first glance, a tracking program might seem to be one of the easier forms of survey research: design an approach and keep repeating it. However, anyone who has implemented tracking programs knows it is not that simple. An abundance of operational details, paired with many forces that mandate changes in the measurement approach from period to period continually challenge the team of researchers running a tracker. The best practices described here can assist such researchers in maintaining the validity and usability of these all-important tracking programs. | Q

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[1] This percentage represents the sum of all customer and employee satisfaction measurement, awareness and usage tracking, and advertising and brand tracking reported for 2006 in *Inside Research*, February 2007, Volume 19, Number 2, Issue 224.

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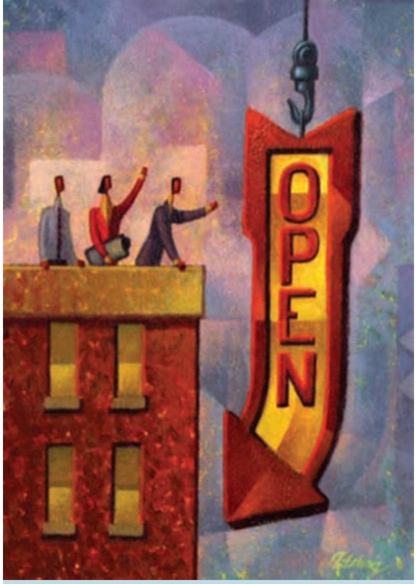

How to build an effective in-house market research practice

By Keith Malo

Using collective learning from present and previous corporate-based research experiences, with past supplier-side employment, this article offers practical suggestions for the internal research team aspiring to strengthen its customer relationships and increase its overall organizational value.

Unlike their supplier-side counterparts who prospect and recruit clients, by default of their own arrangement, in-house research teams are duty-bound to supporting an established, predefined customer base: their colleagues in other functional areas of the same organization.

This institutional marriage enables distinct advantages. Along with bringing to the corporation accessible, cost-effective research expertise, the team likewise possesses an intense intimacy with the enterprise's industry, strategy, business model and inside processes.

And that deep-seated closeness to the client business is something rarely achieved by outside research suppliers.

Similar client challenges

Corporate-based research practitioners and their supplier-side equivalents face similar enduring client challenges.

Much like research suppliers, in-house research teams manage customers charged with conducting satisfaction programs, usability tests and product development research because operating procedures, an executive or accreditation body dictates "it must be done." Frequently this forced or compulsory exercise produces detached clients, with little concern for sound study design and execution "so long as something gets done."

Moreover, internal teams also encounter end-users who don't understand research or appreciate its limitations. Consider customers who accept low sample-size results or findings from a handful of focus groups as absolutes for the basis of decision-making and long-term strategizing. Or the manager who believes that happenstance telephone calls with a few clients is a viable "research program." And how can we overlook the customer who unfailingly interprets unfavorable findings as "simply bad re-

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search"?

Research inherently requires some degree of methodological approach, structure and discipline, as the value of any data is only as good as the process used to obtain it. For those customers on the front line of fast-moving, dynamically changing marketplaces this may appear rigid, time-consuming and perhaps just too much of an obstacle "to have to deal with."

Further complicating the situation, and sometimes correctly, researchers can be perceived as being too focused on research and not concerned with or aware of larger business perspectives.

It is perfectly acceptable for clients, internal and external, to not be researchers themselves, because it's the researcher's job to be the research authority, while the end-user ought to remain the expert of their line of work, be it human resources, product management, marketing, sales or training.

Yet, the situation as a whole presents a promising opportunity for in-house researchers to demonstrate, in significant, not "too research-ey terms," the value the team brings to the table to attain strengthened client partnerships and greater organizational success.

Following are some pragmatic items for in-house research teams to take into account in building shared internal partnerships.

The research team must behave as a true team. Take an objective inventory of the research team's performance behaviors and correct deficiencies early. It is unrealistic to expect clients to partner if the research team itself is disorganized, unfocused and unable to consistently model the competencies that support collaboration, open and constant communication and a culture of customer service. Remember, a team is not just a collection of individuals but rather a group of people purposefully assembled and synergized to accomplish specific goals.

Assume the role of a consultant. The research team should make every effort to be a preeminent, trusted business advisor for its clients. Toward that end, it is important to ask many questions and show appreciation for the customer's strategic goals and situation, including internal political considerations. It is critical that appropriate research team members be included in client meetings, discussions and e-mail exchanges - and vice versa. Equally, the research team has an obligation to proactively educate and inform its clients on the topic at hand, just as an outside consultant would. A successful partnership requires two-way communication, empathy and mutual respect.

Formulate and share project plans. Project plans that are written and contain critical elements - for example, program objectives, key milestones, the roles and obligations of each party along the way


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Moving from validation to inspiration

Researchers can change in-house perceptions by changing their deliverables

By Michael Carlon

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The prevalence of 360-degree marketing, or marketing activation as we called it at Unilever, is a direct result of media fragmentation. Brands have to use "surround-sound" tactics to reach an ever-elusive consumer base. As marketing activation has become more and more popular among brands, consumers are constantly being bombarded by messages in more and more places. As a result, marketers using surround-sound tactics are required to apply breakthrough thinking - sometimes resulting in the creation of new media vehicles and avant-garde messaging.

Eatbigfish is a consulting firm that helps marketers navigate these waters successfully. Through its books *Eating the Big Fish* and *The Pirate Inside*, as well as through its consulting practice, this firm teaches marketers the keys to thinking like a challenger as well as how to encourage this thinking throughout their organizations.

In a nutshell, the philosophy is all about maintaining your brilliant basics (understanding your target, knowing the core equities of your brand, etc.) while at the same time documenting the conventions of your category and breaking them. For example, Apple decided to break the PC color barrier when it launched the iMac. Jet Blue decided to sell food on its flights as a choice to consumers - and the list goes on. Eat Big Fish helps smaller brands play David to the industry Goliaths - and the challenger mindset helps to provide the slingshots. (Note, the challenger mindset is also useful to those larger brands who may be the Goliaths of their industry by helping them to think like a David.)

Not limited to marketers

This line of thinking is not limited to marketers; researchers can apply a challenger mindset to their roles within organizations. We will always be asked to maintain our brilliant basics (understanding HH panel data, product/category forecasting, tracking consumer trends, maintaining technical skills, etc.). However, there are many conventions and beliefs that we as researchers must be willing to break in order to maintain relevance with our marketers as well as grow as a discipline.

Written from a marketer's perspective, these include:

- "*Marketing research costs too much money, and I don't really see a return on this investment. I would rather take this money and place it in a different area.*"
- "*Fielding a study takes too much time. I can't wait four weeks to have this information - I needed it yesterday.*"
- "*My consumer and marketing insights group only serves to evaluate or kill my ideas.*"

While seemingly separate, these three viewpoints are all related. And while marketers would like to think they are a result of some flaw in the research process, they are actually the result of the way many marketers choose to work with their researchers. How many times has an internal client come to you with the following type of request?

"*We have briefed the agency to come back with some ideas as to how we can best launch Product X. We have been working hard over the past two months, and this is what we came up with. We are going to partner with so-and-so to generate buzz through PR. We are doing advertorials in* Magazines X, Y *and* Z. *We are going to drive consumer interest through a promotion and Web tie-in. We are going to have product placement on* Reality Show X *and we are working with Wal-Mart on some great retailtainment programs to get products to fly off the shelf. What we don't have are any consumer insights to back up why we believe this is a great plan. The agency made some stuff up, but it is not that strong. We have a meeting to sell this into the V.P. of marketing next week and have to include some consumer data or else the program*

- are very important to managing expectations and maintaining accountability. You may even request that the client sign plans with the team as a service agreement. Keep in mind, success requires that realistic goals and objectives are established and agreed upon - ideally before a project commences.

Share a common language. Jargon should be kept to a minimum, however undoubtedly the research team will use terms - n-size, mean score, top two-box, index, significance testing, correlation coefficient, conjoint analysis, to name a few - and clients too will use language or acronyms unfamiliar to the research team. That's okay. In conversations and exchanges, have clients repeat back what they heard and similarly take steps to understand their language and repeat back to them what you heard and understood.

Involve clients in the research process. Including clients can help them understand firsthand the research process and perhaps develop a long-term appreciation. Have customers initially document project objectives, desired outcomes and envisioned deliverables. Additionally, allow them to share their perspectives on the marketplace, industry trends and the issue under discovery, as they may have much to contribute. Be sure to keep clients updated of program progress and developments. Bear in mind that against today's business realities it is crucial that the research team be *will get delayed. We cannot afford any delays as creative for the magazines is due in three weeks and we will miss the boat with the reality show because of its production schedule."*

Situations like this are doomed to failure. Costs would be astronomical as the field time will be rushed. Not to mention, regardless of method, it is very hard to plan, field and analyze results in the span of one week. Finally, it sets up the research as something that will be completely evaluative and not at all strategic. What will happen if consumers hate the idea? A lot of hard work will have gone down the drain and the brand will be set back in its plans. In short, no one can end up looking good in this situation.

To turn the above-mentioned beliefs that marketers hold about marketing research on their heads and to prevent situations like the one outlined above, the onus is on research managers everywhere to move away from providing a service that validates ideas to providing a service that helps to inspire ideas. This requires a step change in how we as researchers work with our internal clients. The following collaborative process will aid in this change and serve to add efficiencies to the research process and reduce the overall investment required in marketing research initiatives.

Consumer immersion program

Prior to planning initiatives and agency briefings, the market research manager leads key stakeholders (marketing managers and their agency partners) in a consumer immersion program over the course of three weeks. Week one is designed to uncover all past work that has already been done on the target as well as outl ine key learning gaps. Week two is designed to fill in learning gaps mostly on a qualitative level. During week two, all stakeholders should have hands-on interaction with consumers, which may include ethnographic interviews, focus groups, shop-alongs, etc. Note: These activities should be sprinkled with creative/projective exercises for consumers to complete in order to uncover thoughts/feelings that are largely subconscious.

During week three, the team meets to share and group observations from the experiences, craft insights and select which insights are most fertile for including in an agency brief.

As a result of the program, insights will help to drive the planning process. Agencies then will have the inspiration they require for crafting ideas around consumer-relevant marketing programs. Additionally, the marketers who must then evaluate these programs can do so through the lens of the consumer. Finally, the process can help to uncover those category conventions that are ripe for change.

While the process will lead to a number of program ideas rooted in insight, many marketers will still want an objective way to choose between the outcomes as they may be unsure about which is the most appropriate direction and/or management may want some quantitative evidence supporting a decision. Since the market teams are still early on in the planning process, there should be more than enough time to field a quantitative study to aid in decision-making. This process will be efficient as the ideas to test will already be available and the sell-in of the research will not require as much time (with such a clear understanding of the objectives, a questionnaire will help write itself). In short, up-front investment in insights will eliminate a time crunch on the back end and reduce costs. Finally, as ideas rooted in insights have a higher chance of succeeding than ideas not necessarily rooted in insights, you reduce the risk of having to go back to the drawing board after testing.

The one caveat I have for testing ideas is that it is nearly impossible to evaluate and validate the non-conventional ideas that result from adopting a challenger mindset. Oftentimes, the ideas/positionings that stem from a challenger mindset are so new and different to consumers that they do not know how to react to them. This being the case, the role of the researcher is to inform marketers about the brilliant basics for their category and brand as well as to outline the category conventions ripe for change. Insight work can be done to help stimulate ideas on how the conventions can be changed and even help to draw a line in the sand that consumers would not want you to cross while also validating/evaluating non-conventional ideas which should not be attempted.

Change the conventions

As marketers are beginning to change the conventions of the categories in which they play, marketing researchers must also change the conventions of how we work with marketers. By becoming known as a department providing consumer and marketing inspiration in addition to consumer and marketing insights, researchers will increase their value to their organizations as well as bring excitement and a sense of adventure to the work we do. | Q

open to reasonable project change requests that may arise.

Be flexible, but don't compromise integrity or be an order taker. In-house practitioners, just as their supplier sector peers, have an obligation to be good stewards of the research vocation and that includes performing within industry-accepted standards and practices. Clients likewise have responsibilities to their own industry and internal reporting structures. While the research team must carefully uphold reasonable and defensible standards, it is possible to tailor study designs and approaches to accommodate the realities of contemporary commerce without compromising research program integrity. When appropriate, and as tactfully as possible, be prepared to challenge a client's assumptions and hold the line on project approach, objectives, methodology and timelines. Be sure to listen to them, and don't withdraw when they say "No!" Just as they'll question and challenge suggestions and recommendations, the research team must be prepared to do the same. Don't forget that this is a partnership.

Always be mindful of "the fine line." While the research team has an obligation to adhere to industry-accepted practices, the team is also on the organization's payroll, and hence has a responsibility to promote its employing brand. At times balancing the two roles can be difficult, but it is certainly possible to maintain research standards while serving the needs of your brand.

Demonstrate value. Certainly the team will utilize external research partners for data collection and access to syndicated databases. Rather than simply delivering those supplier-created deliverables internally as-is, the research team must translate the collected information into the organization's own language and provide insightful implications for the business that an outside collaborator can't provide.

Don't become too insular. When commissioning external research organizations to execute research programs, either full turnkey or select phases, take advantage of the opportunity to choose experienced outside research suppliers who can provide objective and novel insights as well as introduce the team to emerging technologies, such as wireless handheld devices, eye-tracking, audio and video diaries, electroencephalogram mapping and functional magnetic resonance imaging or other applications being adopted by the research industry. Partnering with a respected and progressive research organization can help elevate the value that the in-house team brings to its internal clients.

Communicate for your audience. The team must be able to explain pertinent research data in succinct terms for non-researchers to grasp quickly and correctly. Whenever possible, use pictures, graphics, audio clips and video footage in place of cumbersome and exhaustive text. This is especially important when the research team is supporting executives and sales channels. Often company management and its purchasers are not researchers themselves. Put yourself in your audience's shoes and communicate in terms that are meaningful to their business objectives.

Significant investments

Achieving this shared success with internal clients requires that the organization make significant investments in the research team and that the team be resourceful in positioning itself.

Invest in the team's human capital. From the most junior member to the senior analyst and manager, the organization must earmark the assets needed to attract and retain a skilled and competent team. If the research team has an incomplete lineup of talent, it will be unsuccessful. Additionally, if the research team has a leadership void, the team is all but guaranteed to fail. A triumphant in-house research team must have the right leadership in place and this includes management with the wherewithal to:

• successfully recruit and keep qualified and talented research practitioners;

• continuously make technical and interpersonal training and development investments in them;

• maintain constructive relationships with the team's individual

members, clients, prospective clients and senior leadership;

• constantly communicate relevant information to both the team and the institution at large;

• be a strong champion of the team and promote its services and the significance it adds to the enterprise;

• effectively represent the team to secure the resources required for the team to successfully execute research programs; and

• recognize limitations and steer the research team away from initiatives and exercises which have the potential for complete failure.

Invest in the team's technological resources. Now more than ever, advancing technological devices and applications are commonplace in sales channels, executive suites and product development labs. If the research team is to be successful supporting their constituencies and helping advance their business objectives, then they likewise need to be empowered with the latest in analytical, data management and communication tools such as laptops, cell phones and PDAs. This investment keeps the research team on a level playing field with its customers - reinforcing the equal partnership tone - and also helps with the recruitment and retention of skilled and high-performing team members who may also work from remote locations. All company expenditures are a reflection of its values and if the research team is to be a true partner, a competitive differentiator and influencing stakeholder, then the enterprise should fill the team's hardware and software needs.

Brand the research team. To help develop that true team spirit, create a unique image and trademark. By nature of the discipline itself, researchers have a tendency to be uncomfortable promoting themselves. Establishing a distinctive team identity for members to rally behind may help foster cohesiveness and increase overall team awareness and identification amongst other parts of the organization, especially when co-workers continuously see the team's logo on reports, presentations and materials.

Educate the organization on the research team's capabilities. This may be accomplished in many ways:

• Create concise, easy-to-understand branded marketing collateral that illustrates the research team's product and service offerings which can be distributed in hard copy and electronically.

• Develop a branded "research room" on the company's intranet site to post the team's product and service offerings, documents defining commonly used research terms, marketing collateral that sales channels may use with its clients and prospects, select research program findings and of course a team member directory.

• If possible, also include team member photos and biographies on that site - incorporating educational credentials, industry association memberships and individual team member certifications - and make a team member responsible for keeping this material up to date.

• Formally and informally advertise the team's availability and skills at events such as divisional and company meetings. This may be incorporated in the presentation of pertinent research findings.

• Host "lunch and learns," Webinars and one-offs to remind colleagues of the services and value the team brings to the organization.

• Sponsor a regular newsletter or e-newsletter or participate in other organizational newsletters and communication vehicles to again remind colleagues of what the research team can do for them.

Be careful to not overload internal customers; information overkill can be an enemy of the goal. But do take advantage of the captive audience to remind them the in-house research team is available, willing to participate and can aid the advancement of their short- and long-term goals.

Partner with senior leaders. If organizational circumstances facilitate such a partnership, the research team should take advantage of respected and visible senior executives willing to advocate the research team and all it has to offer enterprise stakeholders. This support can go a long way in reaffirming the credibility and legitimacy of the team company-wide. On the other hand, be cautious. In some organizations, boardroom politics could put the team in an awkward position should a senior leader have ulterior motives or lack the knowledge with which to appropriately promote the research team.

Develop and uphold a macro perspective. While maintaining the research aptitude of the team is paramount for success, of equal importance is having an understanding of where the business is going. Team leadership must take the time to educate research team members on the organization's strategy and contemporary initiatives and demonstrate how research can contribute to the accomplishment of those objectives.

This education effort may include sessions with senior management and divisional leaders presenting their strategic visions and goals. When team members approach their individual number-crunching exercises and consultative engagements with a universal or broadened outlook, they are better positioned to create more powerful and useful research-based solutions for customers, thereby increasing the team's overall significance.

Accept change! Perhaps because of the discipline required to conduct sound research, researchers generally resist change. But in modern business, change is inevitable. Unexpected marketplace and organizational developments will no doubt require that project plans, questionnaires, sample design, timelines and even complete program scopes have to be amended post-conception. Don't forget that Darwin suggested that those who adapt to change, as opposed to the strong and intelligent, are more likely to survive. And if the research team is to carry on and thrive, members must embrace change and apply their trained diligence and competence to developing those revised approaches.

Unique culture

Every organization and workplace has its own unique culture and norms. Against that backdrop, an internal research team's success is largely dependent on devising approaches that will capitalize on those customs and acceptable processes. Unfortunately there is no one-size-fits-all set of tactics. This is an area where strong research leadership is necessary to define, chart and guide the research team's strategy.

Moreover some degree of patience and flexibility may be required, especially in organizations with key individuals who have a genuine misunderstanding of the role and functions of the research team.

At the same time, don't promise what cannot be truly delivered. Positioning the research team as a powerful institutional shareholder may result in disaster if the team can't deliver on its pledges.

And don't compromise integrity. The research team will always be caught between upholding accepted industry practices and the need to advance the employing brand, especially in competitive spaces. Since there are no guarantees with research results, it is incumbent on the research team – and particularly its leadership – to develop responsible, creative strategies to bridge the two obligations.

Powerful team

When all the right parts are in place – properly-aligned personalities, attitudes, skill sets and analytical tools – it is possible to develop a powerful and successful in-house research team, one that works well with internal customers to build a collaborative environment, accented with mutual respect and lines of ac-

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Perhaps, says the report, excluding the cell-only respondents also yields lower estimates of technological sophistication. For example, the overall estimate for the proportion of 18-25-year-olds using social networking sites is 57 percent when the cell-only sample is blended with the landline sample, while the estimate based only on the landline sample is 50 percent.

Including a cell-only sample with a traditional landline-based poll is feasible, but cell-only surveys are considerably more difficult and expensive to conduct than landline surveys.

Federal law prohibits the use of automated dialing devices when calling cell phones, so each number in the cell phone sample must be dialed manually.

It also is common practice to provide respondents with a small monetary incentive to offset the cost of the airtime used during the interview.

The screening necessary to reach cell-only respondents among all of those reached on a cell phone greatly increases the effort needed to complete a given number of interviews.

Pew estimates that interviewing a cell-only respondent costs approximately four to five times as much as a landline respondent.

Pollsters recognize that some type of accommodation for the cell-only population will have to be made eventually. For more information visit http://pewresearch.org.

Our cookie deletion skills are crumbling

Results from a study on cookie deletion suggest that great misperceptions about cookies continue to drive online behavior, although a smaller proportion of individuals are adept at cookie deletion. The research, by Stamford, Conn., firm InsightExpress, replicated a study conducted in the spring of 2005.

The results indicate that individuals who choose to delete cookies for one or more reasons possibly misunderstand the roles and functions served by cookie technology. The most common reasons for deleting cookies in 2007 closely match those seen in 2005, with freeing memory at the top of the list, followed by protecting privacy, increasing computer speed and removing spyware. Of these top four reasons, only privacy would be considered a cookie-related issue, although it is one that continues to be debated within the industry.

Surprisingly, despite a greater willingness on the part of 2007 respondents to participate in the survey's test of their cookie deletion skills, a significantly higher proportion of respondents failed to delete their cookies in 2007 than in 2005. In 2005, 59 percent of respondents believed they deleted their cookies, with 35 percent truly successful. In 2007, 63 percent believed they deleted their cookies, but only 28 percent actually did so.

Although cookie awareness has increased, there has been little movement in their perceived importance. Knowledge of cookies is even more common in 2007 than it was just two years ago. Today, approximately 85 percent of respondents claim they know what cookies are, up from 77 percent in 2005. Yet today, as in 2005, only one-third of consumers consider cookies important when using the Internet; over 15 percent are not sure how they would characterize the importance of cookies.

Overall, the research underscores a need for education on the topic of cookies and cookie deletion. Consumers may not understand the function of cookies as a measurement tool, or connect cookies with some of the features that add convenience and power to common Web capabilities. "The reason some consumers don't understand the positive benefits of cookies is because the benefits are passive in nature, and trumped by reasonable privacy concerns," says Tom Willerer, IP media director at media agency Starcom USA. "A possible solution to proper cookie deletion management is to allow consumers more knowledge and control over their information, and by digital companies being more transparent regarding the information being collected and its intended use."

"This study should serve as a wake-up call to both agencies and advertisers," says Rick Corteville, executive director, media at Organic Inc., a San Francisco marketing agency. "As knowledge of cookies continues to increase, marketers need to showcase why having their cookie on a potential/existing customer's machine is important or needed. Personalization features, community-building and tailored creative messaging are just some of the elements which need to be utilized at a higher rate moving forward. As users who delete their cookies tend to delete all their cookies rather than individual ones, it is crucial to show the benefit of cookies on user experience."

InsightExpress fielded a behavioral survey and a perception survey to online respondents in both 2005 and 2007. The sample sizes for the behavioral survey were: 2005 n=780; 2007 n=1,642. The sample sizes for the perception survey were: 2005 n=300; 2007 n=1,009. Both 2005 surveys were fielded in April of 2005, while both 2007 were surveys fielded between mid-March and early May of 2007. The 2007 data were weighted to match the gender and age distribution of the 2005 data to rule these demographic variables out as potential competing explanations for changes from year to year. The 2005 survey data have a margin of error of +/-3.5 percent and +/-5.7 percent, respectively, assuming a 95 percent confidence interval. The 2007 survey data have a margin of error of +/-2.4 and +/-3.1, respectively, assuming a 95 percent confidence interval. For more information visit www.insightexpress.com.

Women more affected by rising gas prices

Rising gas costs remain a controversial issue all across the United States and the impact is felt by many adults. Eight in 10 U.S. adults say they have made changes to their lifestyles due to rising gas costs, with

nearly six in 10 minimizing non-critical travel, 40 percent adjusting their spending habits and 32 percent putting a hold on leisure road-trip travel.

Females are more likely to have made changes to their lifestyle due to the rising cost of gas (84 percent vs. 75 percent for men) and are more likely to have minimized non-critical travel (61 percent vs. 56 percent) and adjusted their spending habits (44 percent vs. 37 percent). Older adults (those ages 45 to 54 and 55 and over) are more likely to have minimized non-critical travel (65 percent and 64 percent respectively vs. 50 percent of those 18 to 34). Younger respondents (ages 18 to 34) are more likely to have driven further to find cheaper gas (15 percent vs. 9 percent for 55 and over) and participated in a car pool (13 percent vs. 5 percent for 55 and over).

These are just some of the results of an online survey of 2,057 U.S. adults ages 18 and over conducted by Harris Interactive, Rochester, N.Y., between June 19 and 21, 2007 for the Wall Street Journal Online.

The vast majority of adults (94 percent) believe it is important to reduce the energy consumption from automobile use. Nearly eight out of 10 consider it important to encourage the development and use of alternative fuels and almost three-quarters believe it is important to increase the fuel efficiency standards on all vehicles. Women are more likely to consider it important to reduce consumption from automobile use (96 percent vs. 91 percent for men), develop communities that are more conducive to walking/biking (45 percent vs. 31 percent), encourage car pooling (47 percent vs. 37 percent) or the development/use of alternative fuels (82 percent vs. 75 percent) and increase fuel efficiency standards (76 percent vs. 69 percent).

Respondents ages 35 to 44 are most likely to consider it important to develop and use alternative fuels (83 percent), while those 18 to 34 are least likely (73 percent) to say this or even to consider it important to increase fuel efficiency standards on vehicles (69 percent). This could be due to a fear that the cost of automobiles will rise as the costs of conserving energy are passed on.

Among those who intend to purchase or lease a new vehicle, 49 percent would consider a hybrid vehicle. Respondents ages 18 to 34 who also intend to purchase/lease are significantly more likely (31 percent) to consider a gasoline-fueled vehicle than older respondents 45 to 54 and 55 and over (24 percent and 25 percent, respectively). Respondents in the lowest income group, less than $35,000, and in the highest income group, more than $75,000, all of whom are planning to purchase/lease, are less likely to consider a gas-fueled vehicle (21 percent and 25 percent respectively) compared to respondents who earn $35,000-$49,900 (34 percent).

Female respondents are more likely to believe the government has a responsibility to engage in energy conservation. In particular, over nine in 10 females believe the government should encourage greater fuel efficiency (compared to 84 percent of males) and 83 percent of females believe the government should mandate higher fuel standards (compared to 75 percent of males).

Harris Interactive conducted online research within the United States between June 19 to 21, 2007 among 2,057 adults (aged 18 and over). Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents' propensity to be online. For more information visit www.harrisinteractive.com.

Game advertising will top $2 billion by 2012

Game advertising spending in the U.S. will grow from $370 million in 2006 to more than $2 billion in 2012, according to Electronic Gaming in the Digital Home: Game Advertising, a new report from Dallas research firm Parks Associates. Over that time, game advertising will achieve a compound annual growth rate of 33 percent, much higher than that of other major advertising media, including TV, radio, print and the Internet.

"Advertising in electronic games had an average monthly household expenditure of less than 50 cents in 2006, while broadcast TV was at $37, meaning advertisers are not using the gaming medium to its full potential," says Yuanzhe (Michael) Cai, director of broadband and gaming, Parks Associates. "If executed correctly, game advertising can provide a win-win solution for advertisers, developers and publishers, console manufacturers, game portals and gamers."

In-game advertising will experience the highest growth rate among the various categories of game advertising methods forecasted, increasing from $55 million in 2006 to more than $800 million in 2012. Specifically, dynamic in-game advertising (DIGA) in PC, console, mobile and casual games will grow from 27 percent of the in-game advertising market in 2006 to 84 percent in 2012.

"DIGA offers several unique advantages, such as timeliness, scalability, measurability and flexibility," says Cai. "But the industry will also have to address several looming challenges, including lack of economy, lack of industry standards and media fragmentation." For more information visit www.parksassociates.com.

Top sites engage viewers, encourage return visits

A new Web site benchmarking offering, the Accenture Web Evaluator, has identified five business-to-consumer (B2C) Web sites as delivering the best brand experience to consumers. The five top sites out of more than 260 evaluated by Accenture Marketing Sciences are nike.com, ford.com, google.com, adidas.com and microsoft.com.

The top sites were successful at engaging consumers using a variety of techniques, such as providing detailed, high-quality information in interesting formats; building relationships through interactive exchanges; and encouraging return visits by current and potential customers through the use of promotions, premium services, clubs and other online innovations. At the same time, Accenture found that many B2C sites fall far short of reaching their full potential to build consumer relationships while supporting branding efforts and product sales.

"By benchmarking the key components among the world's most influential business Web sites, we were able to identify the characteristics that encouraged or discouraged a positive brand experience," says Jeffrey Merrihue, CEO of New York-based Accenture Marketing Sciences. "Our findings indicate that companies can get a greater return from their marketing and brand investments by improving the functionality and impact of their Web sites by adding important information and relevant services, creating engaging features to build relationships and improving the retail and e-commerce linkages."

The Accenture Web Evaluator scores a site on nine factors: search and navigation; information; service; engagement; relationship-building; branding; e-commerce; globalization; and number of visitors.

The Nike site scored particularly high in the areas of engagement, relationship-building and branding, as it delivered instant impact with tight integration with its offline marketing activity and other elements to engage the targeted customers and make it relevant to their daily lives. For instance, Accenture noted that Nike, by using its site to market Nike+ and NikeID, incorporated innovative mechanisms that enable consumers to measure and manage their running regime and even design their own sports shoe.

Google.com was rated as particularly strong in the area of relationship building, as the simplicity of the site's design enables a consumer to set up his or her Google account and return to a home page that is tailored to deliver the information that he or she wants to access on a regular basis. Repeat Google users can readily register to gain access to a variety of services ranging from maps and video to blogs, images and news.

Ford's U.S. site received high marks because of its depth of product information, which the Accenture Web Evaluator rated as detailed, helpful and well-presented. For instance, people who use the Ford site can enter its virtual showroom, where they can access detailed product information that is interactive and easy to use and can also locate dealers, search dealer inventory and learn about financing options.

Microsoft.com provides online services that create customer "stickiness" and deliver value to the customer. The site encourages visitors to return to download software, access user guides and tutorials and obtain other product information.

Accenture Web Evaluator gave the Adidas site high marks for branding, noting that from the moment a user arrives at the Adidas landing page, the site delivers a high-impact positive brand experience with a "wow" factor. That impression is sustained throughout the site, as its design, function and layout support the company's "Impossible is Nothing" messaging with animation, images of star athletes and other design elements that support the slogan and the brand while providing visitors with information about the company and its products. For more information visit www.accenture.com.

Most see mobile ads as not relevant

Four in five consumers who watch mobile video say they are willing to view mobile advertising if the reward is free content. But less than 30 percent feel that mobile ads are relevant to them. These are among the findings from How People Use Mobile Video 2007, a new report from Menlo Park, Calif.-based Knowledge Networks/SRI.

Expanding upon its predecessor in 2006, How People Use Mobile Video 2007 details mobile video usage and interest among those with video iPods, video-capable cell phones and laptop computers, making distinctions between those who actually use mobile video functions and those who do not. The report also offers trends for 2006 versus 2007; for example, use of iPods and cell phones to view video has doubled in the past year.

"Advertisers wisely have entered the mobile video space in a big way; but so far many seem to have missed the chance to leverage the unique qualities of mobile video, such as intimacy and immediacy," says David Tice, vice president and managing director of Knowledge Networks/SRI. "While mobile can indeed be part of larger campaigns, we need to recognize its differences, as well as the ways that different target groups use the medium."

The report shows that mobile video users see little or no difference between mobile video advertising and ads on regular television, in terms of either personal relevance or contextual integration with the content. And, not surprisingly, most of these consumers say that mobile video ads are no more influential for them than those on traditional TV.

The new report also indicates that the proportion of users paying for mobile video dropped notably in the past year among both video iPod users (from 81 percent to 61 percent) and among video cell phone users (from 64 percent to 50 percent).

The average viewing session is quite different for video cell phones (46 percent of users report an average session of 5 minutes or less) compared with video iPods or laptops (53 percent of these users report an average session of 30 minutes or more).

Viewing of movies has risen dramatically among those who use the video functions on iPods (from 1 percent to 54 percent) and laptops (2 percent to 34 percent). For more information visit www.knowledgenetworks.com.

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evolved from its product design and development specialist division. MVP is based on a simulation engine, which allows marketers to experiment with marketing dynamics (awareness, distribution, promotion) and product characteristics (concept, features, packaging, price). The technology lets brand and product managers explore a variety of business scenarios and see their immediate impact in real time. For more information visit www.synovate.com/marketquest.

Study looks at value to home builders of adding electronic amenities

Dallas research firm Parks Associates and Washington, D.C.-based publisher Hanley Wood's *Digital Home* magazine are releasing the 2007 edition of their ongoing Builder Insights study, an annual primary research study of U.S. home builders. Builder Insights 2007 calculates the marketing, sales and financial benefits of offering electronic amenities in homes. This research assesses and quantifies the higher profits and shorter sales cycles that builders report as a result of including electronic products in new homes. It also identifies the recommended sales process for reaching builders.

Builder Insights 2007 is a multi-client project in which sponsors participate in the design of the questionnaires and interview guides to address topics of special interest to them. Topline results of this study will be presented at Hanley Wood's Digital Home Summit on November 26-28 in Las Vegas. For more information visit www.parksassociates.com.

ESRI updates ArcGIS Survey Analyst, releases ArcView workbook

Redlands, Calif.-based ESRI's new ArcGIS Survey Analyst 9.2 has capabilities to enable users to record and maintain survey data and continuous parcel layers as elements that are part of an integrated dataset and data model, called the cadastral fabric. ArcGIS Survey Analyst enables surveyors and geographic information system (GIS) professionals to create and maintain survey and cadastral data in ArcGIS. With this application surveyors can centrally locate, process and manage their data, enabling them to work more efficiently. GIS professionals use ArcGIS Survey Analyst to manage and enhance the accuracy of their data using existing survey methodologies. With the latest release, record data can be held in a continuous database supporting a GIS system for complete spatial data management and analysis. These and other new features and capabilities for ArcGIS Survey Analyst 9.2 are released as part of the ArcGIS 9.2 Service Pack 3, which can be downloaded at www.esri.com.

A new workbook published by ESRI Press teaches basic to complex aspects of using GIS technology, providing lessons in everything from creating maps to using models for advanced analysis. The second edition of *GIS Tutorial: Workbook for ArcView 9* provides updated exercises for ArcView 9.2 and is designed to help both beginners and experienced users become better versed in GIS software functionality. Fundamentals such as adding layers to a map, zooming and panning, measuring distances and labeling map features are presented. The book also offers more advanced lessons in creating pin maps, building a personal geodatabase, geocoding data and conducting spatial analysis. It is available at online retailers or at www.esri.com/esripress.

Lightspeed gets U.K. sports panel rolling

London-based Lightspeed Research has launched its Great Britain Sports Panel, an online specialty panel which pre-identifies consumers on their participation in 70 different sporting activities, from basketball and boxing to tennis and triathlons, as well as those they watch. Also included are: media chosen for following sports including TV, radio, newspaper, Internet, as well as live; British football (soccer), rugby league and rugby union team supported (international and domestic); if the respondent is a sports volunteer, referee or coach; interest in the summer and winter Olympics; and brands of sportswear, footwear and equipment used. For more information visit www.lightspeedresearch.com.

New information product from Euromonitor

London-based information firm Euromonitor International now offers Passport, its new industry information system designed to support multinational organizations with strategic decision-making. Passport brings together all of Euromonitor International's intelligence on industries, countries and consumers in one system. The full Passport system contains 115 million internationally comparable industry, country and consumer statistics, future-focused analysis from a global, regional, country and company perspective, daily comment from Euromonitor's analysts and RealTime News, Euromonitor's online industry news monitoring service. For more information visit www.euromonitor.com.

Itracks builds on online focus group platform

Saskatoon-based Itracks announced an update to its Online Focus Group platform. The latest version contains changes designed to streamline the upload and display of media, probing questions and the moderator's guide. A new service, called Media View, allows moderators to display and control images, Web sites and audio and video files to respondents as they conduct one-on-one interviews over the phone. The firm also added breakout rooms, which allow moderators to conduct friendship or stranger-pair conversations or small-group exercises and then bring the breakout groups back to the main discussion. Moderators can decide who to group together in advance or on the fly. They can group participants by demographic or put people of like mind or oppositional opinion together. For more information visit www.itracks.com.

Two new services from Synovate Healthcare

London-based Synovate Healthcare has launched the Synovate Healthcare Psychoses Therapy Monitor, which will cover the treatment of patients diagnosed with schizophrenia and bipolar 1 and 2, incorporating doctor demographics, attitudinal data and patient records. Initial waves of the Psychoses Therapy Monitor will cover the U.K., France, Germany, Italy and Spain (with expansion into the U.S. soon to follow) and results will be available twice a year.

Separately, the firm also introduced the Synovate Healthcare Diabetes Therapy Monitor in China. It is a syndicated study combining patient medical records with doctor and patient perceptions, providing data on the diabetes market. It currently offers clients access to some 4,000 patient records and 200 diabetes specialists in the country. It will be extended to other Asian markets over the next year. For more information visit www.synovate.com.

System estimates concepts' in-market potential

New York research firm Ipsos is now offering InnoScreen, a global concept screening system that provides an estimate of in-market potential. InnoScreen tests concepts in any category in any country and provides a validated market potential estimate along with guidance on how to improve concepts.

InnoScreen can be applied to any sector and utilizes a modeling framework specific to that sector. For consumer packaged goods, InnoScreen runs on the Ipsos Novaction modeling engine. For the services, durables and technology sectors, InnoScreen uses Ipsos Vantis, which has a normative database of more than 8,000 services, durables and technology concepts. For more information visit www.ipsos-na.com.

Harris adds Advanced Strategy Lab in Europe; Web-based research platform

Harris Interactive, Rochester, N.Y., has launched the Advanced Strategy Lab (ASL) in Europe. ASL is a qualitative research technology that provides simultaneous, anonymous input from up to 24 participants, from any location. Developed by WirthlinWorldwide (now Harris Interactive), ASL has been in place in the United States for more than a decade. Using dedicated facilities, mobile and Web-based labs, ASL facilitates brainstorming, idea generation and solution development through networked computers in a moderated group setting.

Separately, Harris Interactive has introduced GlobalSynch, a Web-based synchronized research platform. It is designed for quick turnaround projects where fast access to results is important; situations that require access to integrated, enterprise-level business intelligence; and studies using multiple sample sources, including customer data. For more information visit www.harrisinteractive.com.

New eye-tracking tools, service from Tobii

The new T/X Series of Tobii Eye Trackers and the Tobii Studio software from Sweden-based Tobii Technology provide a system to collect and analyze gaze data. Tobii Studio offers a new toolbox of visualizations, statistics, reporting and other tools. Features like demographic filtering/questionnaires, logging and remote viewing have been added to create a complete platform for marketing research. Tobii Studio is suited for evaluating all visual media such as print advertising, TV commercials, direct marketing, out-of-home, Web sites, software, e-mail campaigns, online advertising, computer games and interactive TV, as well as physical elements such as shopping shelves, packaging, store planning etc.

New hardware characteristics such as a much larger head movement allowance, higher speed and automatic optimization of bright and dark pupil tracking make it easier for marketing researchers to add eye tracking to their services and perform tests efficiently and accurately.

In addition to the new products Tobii has introduced a new business model. Tobii ForSight is a subscription and pay-per-use offer allowing clients to get a full eye tracking lab in-house without an upfront investment and with the right to change configuration or to cancel at any time. The subscription also gives access to new training services, Webinars, user meetings, test designs, methodology and more. For more information visit www.tobii.com.

Briefly

The National Food Laboratory Inc., Dublin, Calif., has launched the Innovation Group, a 30-member in-house organization devoted to assisting companies in creating, developing and commercializing new food and beverage products. The Innovation Group brings together individuals with experience in new product strategy, ideation, market intelligence, consumer design and execution strategies to help clients translate culinary concepts into commercial products. For more information visit www.thenfl.com.

Online social networking site Facebook now offers Facebook Polls, a function which allows users to ask detailed questions, target them to specific user segments and receive real-time responses from Facebook's 31 million users based on gender, age, school, location or profile keyword. For more information visit www.facebook.com/polls.php.

A joint venture of market research

firms Latin Pulse and AcuPOLL Research has created a new U.S. Hispanic consumer testing service offering the ability to conduct quantitative research among less-acculturated Hispanic consumers online. For more information visit www.acupoll.com.

ComScore Inc., Reston, Va., has debuted comScore Segment Metrix, a new tool that works with a variety of consumer segmentation schemes to give marketers the ability to track, analyze and report Internet activity by consumer groups. The product integrates behaviorally-defined segments, geo-demographic segments, and proprietary, client-defined segments with the comScore online panel. For more information visit www.comscore.com.

Denver research firm iModerate is now offering its Optimum!nsight product, which offers clients real-time qualitative consumer feedback within 36 hours on stimuli during the development phase of new ads, products and concepts. Utilizing iModerate's proprietary methodology and IM-based chat platform, the firm's moderators conduct one-on-one interviews to garner commentary from consumers. For more information visit www.imoderate.com.

Nielsen//NetRatings, New York, has added both "Total Minutes" and "Total Sessions" metrics to NetView, its syndicated Internet audience measurement service. While NetView has always reported average time per person and average number of sessions, the new metrics deliver increased perspective on total engagement across sites.

Separately, Nielsen//NetRatings has debuted VideoCensus, a syndicated online video measurement service that combines panel and census research methodologies and provide an end-to-end accounting of audience size, demographic composition, engagement and competitive activity. For more information visit www.nielsen-netratings.com.

NSON Opinion Research, Salt Lake City, has formed a new division to provide research services to companies and their agencies in developing products and services for consumers in their 50s and 60s. Leslie Harris will head the new division. For more information visit www.nsoninfo.com.

Dulles, Va.-based research services firm Vovici is now offering the Market Research Edition of its EFM (Enterprise Feedback Management) Community product today. EFM Community MR provides an integrated solution including questionnaire authoring, client collaboration, panel/respondent management, flexible deployment and real-time results reporting and analysis. At press time, the EFM Community Market Research Edition was slated to be available in fall 2007. For more information visit www.vovici.com.

U.K. research consultancy Nunwood has added in-store video observation to its shopper insight services. For more information visit www.nunwood.com.

The London office of researcher OTX announced the expansion of its movie tracking service to cover Russia and China. This service provides customers in these regions with weekly reports on consumer awareness of and interest in feature film releases. For more information visit www.otxresearch.com.

Issues & Answers Network Inc., Virginia Beach, Va., will expand its telephone polling facility in Connersville, Ind. This call center was opened in June with 60 telephone interviewing stations and has been increased to 106 stations. For more information visit www.issans.com.

Sydney-based research process outsourcing firm Pulse Group has created a new qualitative division and is now offering viewing facilities for focus groups. The launch is part of a strategic alliance between Pulse Group and Itracks. For more information visit www.pulse-group.com.

London-based Research Now has launched a proprietary online Brazilian panel, Opiniões de Valor, at www.opinioesdevalor.com.br. In addition, the firm now offers a proprietary research–only online panel in New Zealand.

Power Systems Research, St. Paul, has completed the second-quarter update of published data and qualitative profiles of industry leaders monitored in CV Link, the commercial vehicle forecast. In addition, combustion engines production volumes have been updated in EnginLink and engine-driven equipment production volumes have been updated in OE Link. All are databases available to subscribers and based on historical, current and forecast production volumes within the powertrain industry. For more information visit www.powersys.com.

Prezza Technologies, Cambridge, Wash., is now offering an on-demand, or software-free, version of a mobile survey system that connects with Checkbox Online servers hosted by Prezza Technologies. Checkbox Mobile devices are designed to complement an organization's Internet browser-based feedback collection system by offering a way to collect feedback in the field with handheld devices or tablet PCs. For more information visit www.prezzatech.com.

WAC Survey, Great Neck, N.Y., now offers a range of services in the word-of-mouth arena, focusing on blog tracking/analysis and buzz metrics. For more information visit

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Ciao in 1999 and, following its acquisition by Greenfield Online Inc. in April 2005, had served as the company's executive vice president of corporate development, and an observer on the Greenfield Online board of directors. Piening, who joined Ciao in 2000, had served as senior vice president, European and Asian sales and operations. They will be succeeded by Nicolas Metzke, who has been appointed managing director of Ciao. Metzke has been with Ciao since 2000 and will head Greenfield Online's European subsidiary Ciao GmbH through the separation process and the Internet survey solution business going forward.

Harris Interactive, Rochester, N.Y., has acquired **MarketShare**, a private Asian research firm with co-located headquarters in Hong Kong and Singapore, and **Decima Research**, a private Canadian research firm based in Ottawa.

SV Investment Partners, a private equity firm, has acquired Stamford, Conn.-based **FocusVision Worldwide Inc**. in partnership with the company's management team. Terms of the transaction were not disclosed. In conjunction with the transaction, SV Operating Partners William "Jay" Wilson and Douglas B. Fox have joined FocusVision's board of directors and will serve as strategic advisors to the business.

Germany-based **GfK Group** has acquired the business of Greece-based **Edge Market Research and Consultancy**, which now belongs to a Greek subsidiary, GfK Market Analysis. Separately the firm announced the acquisition of **Stratum Healthcare**, which has offices in Zagreb, Croatia and Belgrade, Serbia.

The Nielsen Company, New York, reached an agreement to acquire San Francisco-based **Telephia Inc.**, a provider of syndicated consumer research to the telecom and mobile media markets. Terms of the transaction, which is subject to regulatory approval and expected to close in the third quarter, were not disclosed. Telephia and Nielsen are both privately-held companies.

Separately, in news reported after the July/August issue went to press, the Nielsen Company (formerly VNU) and **NetRatings Inc.** completed the previously announced merger of NetRatings with a wholly-owned subsidiary of the Nielsen Company. The merger was approved by the stockholders of NetRatings at a special meeting held in June. As a result of the merger, NetRatings became a privately-held company, wholly owned by the Nielsen Company and its subsidiaries. Shares of NetRatings' common stock, which prior to the merger traded on the Nasdaq Global Market under the symbol NTRT, were delisted from trading on June 22.

Cambridge, Mass., research firm **Abt Associates** has acquired the strategy and research firm **Schulman, Ronca & Bucuvalas Inc.** (SRBI). Headquartered in New York City, SRBI will operate as a wholly-owned subsidiary of Abt Associates led by current President and CEO Mark A. Schulman.

Paris-based **Ipsos** has acquired Australian research firm **Eureka**.

Dulles, Va., research firm **Vovici** has acquired assets from Seattle survey software provider **Raosoft Inc**. Under the terms of the agreement, Vovici will assume responsibility for providing support for Raosoft's existing EZSurvey and EZReport clients for the duration of their maintenance contracts. Raosoft will retain all business activities, including customer support, for its InterForm product.

Omaha, Neb., information firm **infoUSA** and New York research firm **Guideline Inc.** have entered into a definitive merger agreement to provide for the acquisition of Guideline by infoUSA. The total transaction value, including the assumption of debt, will be approximately $41.6 million. Founded in 1969 as FIND/SVP, Inc., Guideline reported $46 million in revenue in 2006.

Under the terms of transaction, infoUSA will pay $1.35 per share of Guideline common stock, in cash, and an amount equal to the liquidation preference and accrued dividends for outstanding shares of Guideline preferred stock. The acquisition will be effected by a tender offer for all outstanding Guideline shares, followed by a second-step merger. InfoUSA will finance the transaction with cash on hand and borrowings under its credit facility. InfoUSA expects the acquisition of Guideline to be accretive to earnings in fiscal 2007. The transaction, expected to close in the third quarter of 2007, is subject to customary closing conditions.

Guideline will remain headquartered in New York and will operate independently as part of infoUSA. Marc Litvinoff, who has been with Guideline since 2004, will become the company's CEO.

Decipher Inc., a Fresno, Calif., research firm, has acquired **Forefront Consulting Group**, a company specializing in programming and hosting, data management and custom development services for market researchers. Forefront Consulting Group has changed its name to Decipher Inc. The Forefront team will continue to reside in the firm's Hollywood, Calif., office. Forefront founders Kristin Luck and Ji Yeong Kim will join the Decipher senior management team as president, and senior vice president, data management, respectively. The combined companies will total 52 full-time U.S.-based employees with targeted 2007 revenue in excess of $10 million.

Market Strategies Inc. (MSI), a Livonia, Mich., research firm, has merged with **Doxus**, a Portland, Ore., research firm. Additionally, MSI formally announced its name change to Market Strategies International. Doxus will become the technology industry group within MSI.

Toledo, Ohio research firm **Trendex North America** has purchased the following syndicated studies from **Synovate Canada**: the Canadian Beauty Care Study, Footwear Market Index - Canada, and Canadian Personal Accessories Study.

Alliances/strategic partnerships

Rochester, N.Y.-based **Harris Interactive** has expanded its affiliate network, adding Kenya-based **Infotrak Research and Consulting** to its roster.

Germany-based **GfK Group** and **BGK GmbH** have set up a joint venture. The new company, in which GfK has a 70 percent stake, will operate internationally under the name of **GfK m2** and concentrate on the entertainment electronics industry. The company is headquartered in Hergiswil, Switzerland.

Chicago sports marketing and media services agency **rEvolution** has formed a strategic alliance with Menlo Park, Calif., research firm **Knowledge Networks** through which the two will deliver sponsorship research and consulting.

Lightspeed Research, Basking Ridge, N.J., has formed a joint venture company with China-based research agency **Millward Brown-ACSR**. The new company will be known as **Lightspeed MB-ACSR**. The venture will combine Lightspeed Research's research panel networks with Millward Brown-ACSR's data collection services. Through this venture, Lightspeed MB-ACSR will provide online data collection solutions to Kantar companies including Millward Brown, Research International China and Oracle Added Value, as well as to other non-Kantar clients.

Denmark-based online research firm **Zapera.com A/S** and **Bashkirova and Partners,** a Moscow-based research company, have formed a pan-Nordic-Russian partnership agreement. Under the terms of the agreement, the two companies will grant each other access to their respective online consumer panels and CATI facilities, allowing both companies to serve their corporate clients across Northern European and Russian borders.

Denmark-based **iMotions – Emotion Technology A/S** agreed to a long-term partnership with Swedish firm **Tobii Technology** to bundle iMotions' Emotion Tool software with Tobii's eye trackers.

Association/organization news

The **Advertising Research Foundation** has formed the Online Research Quality Council. Its mission will be to develop a set of standards for research buyers and sellers to follow. The new council will enlist support from the global market research industry and will be led by a steering committee of research executives: Robert Tomei, executive vice president and global director of Access Panels, TNS; Efrain Ribeiro, chief operating officer, Ipsos Interactive Services; Steve Coffey, chief research officer, the NPD Group; Josh Chasin, chief research officer, comScore; Jonathan Jephcott, executive vice president, ViewsNet, Synovate; and Renee Smith, vice president, panel quality, Harris Interactive. The council will be managed by a rotating chairperson selected from the steering committee members for a six-month period. The initial chairperson will be Tomei.

The **Marketing Research Association** (MRA) has launched a redesign of its Web site, www.mra-net.org, to provide users with improved access to information on MRA's activities, membership benefits, business development opportunities, education and training, and research's legal and regulatory issues.

Separately, the MRA announced its Exchange Evaluation Program (EEP), an online rating system used by research companies and client companies to rate business transactions and how well a product or service works for business needs. EEP is a peer-to-peer review system, allowing companies and organizations to post reviews for any business entity that they have conducted business with. Reviews are based on ratings of quality, communication and other factors that are of key importance in selecting a dependable service or product.

Users will address issues between buyers and sellers of research in an online setting, and offer a forum for rating companies. Rating factors include: payment history; compliance with payment terms; ease of contact and communication; clarity and detail of communications and instructions; accuracy of job order specifications; and overall professional conduct. For more information visit www.mra-net.org.

Harris Interactive, Rochester, N.Y., has joined the **British Polling Council** (BPC), an association of polling organizations that publish research results. Modeled after the National Council on Public Polls in the U.S., the BPC promotes standards of disclosure that ensure that the consumers of published surveys can adequately interpret the results as well as judge their reliability and validity.

The **Council of American Survey Research Organizations** (CASRO) announced that its membership has overwhelmingly approved a revision to the Internet Research section of the organization's mandatory and enforceable Code of Standards and Ethics for Survey Research.

The revision of the Code addresses the practice of online surveys, specifically the e-mail solicitation of survey respondents, use of "active agent" technology to capture behavioral data, and proper communication/disclosure with members of online survey panels.

"We are proud to establish the world's highest personal privacy standards for the research industry's fastest-growing data collection methodology," said CASRO President Diane Bowers in a press release. "The fact that passage of this revision was nearly unanimous definitely speaks to the care in drafting the revision, as well as to the commitment of our member companies to conduct their businesses beyond reproach."

By joining CASRO, member companies pledge annually to adhere to the organization's set of industry standards. To view the complete Code visit www.casro.org/codeofstandards.cfm.

A new organization called the **Association for Downloadable Media** has been created to provide advertising and audience measurement standards for the podcasting industry. It was established by a group of 15 companies, including Apple and Nielsen Online.

Its mission statement is to provide "leadership in and organization of advertising and audience measurement standards" as well as "research, education and advocacy to all those involved in portable media across the Internet, iPods, MP3 players, mobile devices, P2P and other upcoming platforms." For more information visit www.downloadablemedia.org.

Awards/rankings

Chicago accounting firm **Grant Thornton LLP's** Survey of Upstream U.S. Energy Companies won the Marketing Achievement Award (MAA) in the "survey/research" category presented at the 18th annual conference of the Association for Accounting Marketing (AAM). The AAM-MAAs are presented in recognition of outstanding achievements in the areas of accounting marketing, professional services and communications, with accounting firms from across the United States and Canada competing.

Market Connections Inc., Fairfax, Va., has received the 2007 Helios Apollo Award in the Emerging Company category. The Helios Apollo Awards, sponsored by Helios HR in partnership with the Washington, D.C. metropolitan chapter of the Society of Human Resource Management, honors four organizations that promote a continuous learning environment as part of their culture.

Corvallis, Ore., research firm **InsightsNow Inc.** was named as the second-ranked business on the *Portland Business Journal*'s Fastest-Growing Private Companies list. InsightsNow reported an overall growth rate of 548 percent from 2004 to 2006.

New accounts/projects

Survey Sampling International, Fairfield, Conn., has selected software from Netherlands-based Nebu as a component of its global Internet panel management and interviewing platform. Nebu products include its panel management system Dub Knowledge and its survey system Dub InterViewer.

ESPN Radio has entered into a multi-year agreement for New York-based **Arbitron's** Portable People Meter radio ratings services for its five owned-and-operated radio stations. Separately, **Crawford Broadcasting Company** has entered into a multi-year agreement for the Arbitron Portable People Meter audience measurement service when the PPM system is deployed in Chicago, starting in January 2008.

Wal-Mart has endorsed **Knowledge Networks**, Menlo Park, Calif., as the online panel research company to conduct custom studies using the retailer's proprietary Segmentation Lens.

Oslo-based research software firm **Confirmit** announced that Toronto-based **Research House** has licensed the Confirmit MR platform for its online market research services.

Tesco PLC and its Tesco USA division will use Trade Dimensions, a marketing intelligence service from the **Nielsen Company**, Schaumburg, Ill., in the U.K.-based grocer's impending U.S. launch. As Tesco USA rolls out its new 10,000-square-foot Fresh & Easy Neighborhood Markets in Las Vegas, Los Angeles, Phoenix and San Diego, Trade Dimensions will provide information to help the retailer analyze the viability of each potential site using data from the TDLinx Channel Database.

New companies/new divisions/ relocations/ expansions

Kuala Lumpur-based research process outsourcing firm **Pulse Group** has opened an office in New York City and tapped John Saez to head it.

Research firm **Kadence** has opened new offices in Jakarta and Kuala Lumpur. Both new offices launch with a team of five market research professionals and will deliver quantitative and qualitative services. Singapore will remain Kadence's Asian regional head office.

India-based research process outsourcing firm **Dexterity** has opened an additional facility in Chennai, India to host another 250 employees.

Reston, Va.-based **comScore** has established comScore Japan KK as its first customer service office in the Asia-Pacific region and named Maru Sato managing director of the new office.

Mature Marketing & Research L.L.C. has opened offices in Teaneck, N.J.

BIGresearch, Columbus, Ohio, has opened a New York office and named Holly Williams as vice president of sales to manage it.

Greenfield Online Inc., Wilton, Conn., has established a Greenfield-Ciao office in Shanghai.

Company earnings reports

The **Nielsen Company**, New York, announced its financial results for the first quarter 2007. Reported revenues for the first quarter successor period (January 1, 2007 to March 31, 2007) were $1,072 million, an increase of 5 percent in constant currency over the reported revenues for the first-quarter predecessor period (January 1, 2006 to March 31, 2006) of $1,003 million. Reported operating income for the first quarter successor period 2007 of $56 million compared to pro forma operating income of $62 million in the first quarter 2006. The first quarter 2007 results were negatively impacted by $19 million in restructuring costs and $8 million of costs associated with recruiting and other acquisition-related compensation. Covenant earnings before interest, taxes, depreciation and amortization and other adjustments permitted under the firm's senior credit facility (covenant EBITDA) was $1,121 million for the 12-month period ended March 31, 2007.

U.K. research consultancy **Nunwood** announced 58 percent growth in the first half of 2007 compared to same period last year.

Greenfield Online Inc., Wilton, Conn., announced financial results for its second quarter ended June 30, 2007. Total net revenue was $30.8 million for the second quarter of 2007 as compared with $24.5 million for the same period in the prior year for an increase of $6.3 million or 26.1 percent, of which approximately $0.9 million or 3.9 percent was due to favorable currency effects.

For the Internet survey solutions segments, total third-party net revenue was $23.3 million for the second quarter of 2007, as compared with $20.2 million for the same period in the prior year for an increase of 15.4 percent.

For the comparison shopping segment, total third-party net revenue was $7.5 million for the second quarter of 2007, as compared with $4.2 million for the same period in the prior year for an increase of 77.1 percent.

Total gross profit was $22.6 million or 73.2 percent of revenues for the second quarter of 2007, as compared with $18.9 million or 77.3 percent of revenues for the same period in the prior year.

Operating income was $4.4 million for the second quarter of 2007 or 14.3 percent of revenue, as compared to operating income of $3.7 million or 15.1 percent of revenues for the same period in the prior year.

Net income for the second quarter of 2007 was $3.1 million as compared with net income of $2.3 million for the same period in the prior year.

Net cash flow provided by operating activities was $7.6 million for the second quarter of 2007 as compared to $5.1 million for the same period in the prior year.

National Research Corporation, Lincoln, Neb., announced results for the second quarter ended June 30, 2007. Revenue for the quarter was $11.9 million, compared to $10.7 million for the same period in 2006. Net income for the quarter was $1.6 million, or $0.24 per basic and $0.23 per diluted earnings per share, compared with net income of $1.3 million, or $0.19 per basic and diluted share, in the prior year period.

Revenue for the first half of 2007 increased 20 percent to $24.1 million, compared to $20.1 million for the same period in 2006. Net income for the first six months of 2007 increased 28 percent to $3.2 million resulting in $0.47 per basic and $0.46 per diluted earnings per share, up 27 percent and 24 percent respectively, over the same period in 2006.

During the second quarter of 2007, **infoUSA**, Omaha, Neb., delivered record revenues of $160.1 million, which includes $50.1 million for Opinion Research. Excluding Opinion Research, revenue was $110 million for the second quarter of 2007, compared to $100.3 million for the same period in 2006, an increase of 10 percent.

InfoUSA's second-quarter operating income was $16 million, which includes $2.6 million for Opinion Research. Excluding Opinion Research, operating income was $13.4 million, compared to $7.5 million in the second quarter of 2006. The company also recorded expenses of $1.5 million related to the transition of infoUSA National Accounts to Omaha.

InfoUSA's earnings per share for the second quarter of 2007 were $0.11 versus $0.06 in the second quarter of 2006. EBITDA for the second quarter was $24.9 million, which includes $5 million for Opinion Research. Excluding Opinion Research, EBITDA was $19.9 million, compared to $15.6 million in the second quarter of 2006. During the second quarter the company recorded $0.4 million in non-operating expenses primarily related to losses on sales and impairments of investments.

Segment revenue in the second quarter for the marketing research group was $50.1 million. The marketing research group is composed of Opinion Research and Macro International, acquired December 4, 2006.

SPSS Inc., Chicago, reported results for the quarter and six months ended June 30, 2007. The company reported second-quarter revenues of $68.9 million, an increase of 9 percent from $63.5 million in the second quarter of 2006. New license revenues were $32.4 million, up 10 percent from $29.3 million in the same quarter last year. Operating income increased to $10.2 million, or 15 percent of revenues, from $6 million, or 9 percent of revenues, in the 2006 second quarter.

Diluted earnings per share in the 2007 second quarter were $0.36, compared to $0.12 for the same quarter last year. Charges for stock-based compensation were $2.6 million and $2.2 million in the second quarter of 2007 and 2006, respectively.

The company continued to identify cost-saving initiatives and drive productivity improvements in the 2007 second quarter, including the expected closure of three facilities, all of which should be completed by year end. Operating results in the quarter included reorganization and related pre-tax charges of $0.7 million or approximately $0.02 EPS. Additional charges related to these initiatives will be recorded in the 2007 third and fourth quarters.

Revenues for the six months ended June 30, 2007 totaled $139.1 million, an increase of 11 percent from $125.7 million for the same period in 2006. New license revenues were $67.3 million, up 14 percent from $59.2 million in the same period last year. Operating income increased to $22.3 million, or 16 percent of revenues, from $13 million, or 10 percent of revenues, in the 2006 six-month period. EPS was $0.75, compared to $0.35 in the same period a year ago. Charges for stock-based compensation were $4.5 million and $3.1 million in the first six months of 2007 and 2006, respectively. The effective income tax rate in the 2007 six-month period was 37 percent, compared to 38 percent in the same period last year.

Cash at June 30, 2007 was $278.4 million. Cash from operations increased to $34.7 million in the six months ended June 30, 2007 from $14.6 million in the same period in 2006.

For the second quarter of 2007, **Arbitron Inc.**, New York, reported revenue of $79 million, an increase of 6.6 percent over revenue of $74.2 million during the second quarter of 2006.

Costs and expenses for the second quarter increased by 17.1 percent, from $67.3 million in 2006 to $78.8 million in 2007, due in part to planned expenditures for the rollout of the Portable People Meter ratings service in Philadelphia, New York, Nassau-Suffolk, Middlesex-Somerset-Union, Los Angeles, Riverside and Chicago.

Earnings before interest and income tax expense (EBIT) for the quarter were $5.4 million, a decrease of 55 percent compared with EBIT of $11.9 million for the second quarter of 2006.

Net income for the quarter was $3.8 million, compared with $7.4 million for the second quarter of 2006. Net income per share for the second quarter of 2007 was $0.13 per share (diluted), compared with $0.24 per share (diluted) during the comparable period last year.

For the six months ended June 30, 2007, revenue was $170.8 million, an increase of 7.3 percent over revenue of $159.3 million for the same period in 2006.

EBIT decreased 26.6 percent from $41 million in the first six months of 2006 to $30.1 million in 2007. Net income for the period in 2007 decreased 24.5 percent to $19.3 million compared with $25.5 million in 2006. Earnings per share (diluted) for the six months in 2007 were $0.64, compared with $0.83 per share (diluted) last year.

IMS Health, Norwalk, Conn., announced second-quarter 2007 revenue of $537.5 million, up 11 percent or 8 percent on a constant-dollar basis, compared with revenue of $486.2 million for the second quarter of 2006.

Operating income in the second quarter of 2007 was $118.1 million, up 11 percent or 13 percent constant dollar, compared with $106.3 million in the year-earlier period. Excluding a merger cost of $6 million in the 2006 second quarter, on a non-GAAP basis, operating income growth would have been 5 percent or 7 percent constant dollar.

Second-quarter 2007 diluted earnings per share on a GAAP basis were $0.36, compared with $0.30 in the prior-year quarter, an increase of 20 percent. Earnings per share for the second quarter of 2006 included foreign exchange hedge gains and losses, a tax provision related to a reorganization and income and expenses related to the terminated merger with the Nielsen Company (formerly VNU). When adjusted for these items and the phasing of tax benefits and provisions, on a non-GAAP basis, earnings per share for this year's second quarter would have grown $0.05 year over year to $0.39, a 15 percent increase.

For the first half of 2007, revenues were $1,047.8 million, up 12 percent or 9 percent constant-dollar, compared with revenue of $932.4 million for the first half of 2006. First-half 2007 operating income was $229.2 million, a 13 percent increase or 14 percent constant dollar, compared with $203.1 million in the year-earlier period.

For the first six months of 2007, diluted earnings per share on a GAAP basis was $0.79, compared with $0.86 in the prior-year period. Earnings per share for the first half of 2007 and 2006 included net tax benefits and foreign exchange hedge gains and losses, while the second quarter of 2006 also included merger-related income and expenses. When adjusted for these items, on a non-GAAP basis, earnings per share for the 2007 first half would have grown $0.09 year over year to $0.74.

Net income on a GAAP basis was $159 million, compared with $180.8 million in the first half of 2006. Net income for the first six months of 2007 and 2006 included net tax benefits and foreign exchange hedge gains and losses, net of taxes, while the second quarter of 2006 also included merger-related income and expenses. Adjusted for these items, on a non-GAAP basis, net income for this year's first half would have grown $13.2 million.

Oslo-based **Confirmit** reported that revenue increased in the second quarter of 2007 by 34 percent to $6.1 million. Pre-tax profit for the second quarter amounted to $558,000, an increase of 65 percent compared to the corresponding quarter of 2006.

Names of Note

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Andy Gallacher has been named head of insight consulting at the London office of research firm *Skopos.*

Paris-based research firm *Ipsos* has named **Lisiane Droal** executive vice president, global human resources and added **Tom Markert** as global CEO of Ipsos Loyalty.

InsightExpress, Stamford, Conn., has named **Barbara Shapiro** director, media sector, and **Ray McIntyre** senior account executive, consumer packaged goods sector. **Nancy Dillon** and **Janett Haas** have been named senior account executive and **Alicia Allijan** and **Leslie Newburn** have been named account executive. In the firm's online media measurement group, **Darcy Briggs**, **Junny Cho** and **Melissa Sherman** have been promoted to senior project manager and **Jamie Chang** and **Kelly Thomas** have been named project managers.

Atlanta research firm *CMI* has named **Mike Gray** senior vice president of sales.

Gray **Miller**

Cincinnati research firm *Burke Inc.* has named **Jeff Miller** chief operating officer.

Issues & Answers Network Inc., a Virginia Beach, Va., research firm announced a number of promotions: **Carla Lindemann** to chief operating officer; **Peter W. Scheidemantel** to chief financial officer; **Maida Y. Tipping** to senior vice president, human resources; **Jennifer Wiesen** to account executive; and Susan Peterson to account executive.

ICR, a Media, Pa., research company, has named **Allen Khorami** president and CEO. In conjunction, the firm announced the retirement of **Gil Barrish.**

Bellomy Research Inc., Winston-Salem, N.C., has named **Sekxanh Chanthaboury** marketing sciences analyst. **Karin A. Ferenz** has joined the company as vice president, customer loyalty management. **Blythe Gridley** has been named research associate and **Stacey Panchyshyn** has been added as research manager.

Chanthaboury **Ferenz**

Gridley **Panchyshyn**

Diagnostics Plus, a State College, Pa., research firm, has named **Kim Erickson** as an analyst specializing in the education sector.

Jacob A. Klerman has joined Cambridge, Mass.-based researcher *Abt Associates* as a principal associate in the social and economic policy division. The firm also named **Constantin Abarbieritei** division vice president for international economic growth.

Saskatoon-based research firm *Itracks* has named **Tom Champion** corporate account executive in the U.S. Southeast region and promoted **Lindsay Decker** to corporate account executive in the American Midwest.

Global Market Insite Inc., Seattle, has named **Michael A. Brochu** CEO.

Roger Green and Associates Inc., a New Hope, Pa., research firm, has named **Andrew R. Ginsberg** executive vice president and promoted **Bruce Duncan** to the newly created role of chief research officer.

Focus Pointe Global, Philadelphia, has named **John Sadler** and **Michelle Ko** vice president client services. Separately, the firm's **Jamie Katzenstein** has been elected a director on the board of the Philadelphia Chapter of the *Marketing Research Association*.

Syracuse, N.Y., research firm *KS&R* has named **Yvette Wikstrom** director of business development. She is based in Denver.

Ahmad Al-Assad has joined Dubai-based *Maktoob Research* as regional research manager.

Harris Interactive, Rochester, N.Y., has named **Jeff Stewart** senior vice president, head of global account development. He is based in New York City.

Tampa, Fla., research firm *Schwartz Consulting Partners* has named **Christopher Edge** manager - business development and field services and added **Kenneth Strickland** as quantitative analyst.

Lightspeed Research, Basking Ridge, N.J., has named **Seth Ruoss** executive vice president, marketing and business strategy.

The Marketing Research Association presented **Mimi Nichols** of San Francisco-based *Nichols Research Inc.* with its Honorary Lifetime Membership Award for 2007.

Paolo Miscia has been named CEO of London-based *KMR Software*, a division of research firm KMR.

Miscia

Hartley

Farmington Hills, Mich., research firm *MORPACE International Inc.* has named **Tom Hartley** vice president. He is based in the firm's New York office.

In the Montreal office of *Angus Reid Strategies*, **Angela Spathis** has been named vice president.

Gongos Research, Auburn Hills, Mich., announced several new hires. In its consumer products division, **Kerstin Siemes** has been named project director and **Jennifer Logan** has been named project coordinator. In retail/services, **Kelly Jasper** has been named project director, **Nicole Kusha** has been named senior project coordinator, and **Julie Baghdoian** has been named project coordinator. In automotive/powersports, **Mitch Uyeda** and **Amanda Goodrich** have been named project coordinator. In addition, **Matt Castle** and **Kristopher Torry** have joined the firm as programmer/analysts.

Simmons Research, New York, has named **Steve Walsh** senior vice president, director of sales; **Sarah Thomson** director of West Coast advertiser sales; and **Drew Simpson** vice president and director of Experian local market services.

Power Systems Research, St. Paul, has

Pinault

named **Dan Pinault** director of client services.

Cable network *Fuse* has named **Ritchie Yu** vice president, research.

Charlotte, N.C., focus group facility *20/20-Charlotte* has named **Rachel Weiss-Fuentes** project manager.

Kuala Lumpur–based *Pulse Group* has named **Alvin Chia** director of client development and named **Andrew Yeoh** and **Chan Choy Ping** associate director. The firm opened a New York office and tapped **John Saez** to head it. Other appointments include: **Melanie Mak** as client development executive; **Nitin Gulati** as CATI manager; **Farhath Unnisa** as project manager; and **Jessica Seth** as panel manager.
The Council for Marketing and Opinion Research, Washington, D.C., has named **Donna Neal** co-chair of its board of directors.

Research firm *Observation Baltimore* has promoted **Allisa Rhodes** to client services manager.

Jack Noonan, president and chief executive officer of *SPSS Inc.*, Chicago, won the Ernst & Young Entrepreneur Of The Year 2007 award for the Lake Michigan area.

Scott Arnold has joined San Francisco research firm *MarketTools* as COO.

WAC Survey, Great Neck, N.Y., has promoted **Zach Grossman** to vice president, director of research. In addition, **Arlene Langer** has joined WAC Survey as vice president, director of WAC Survey's W.O.M./data mining division.

Chicago-based *Research International* announced a number of appointments: **Karen Stahl** has joined as vice president; **Catherine Coleman** has been named senior account executive; **Derrick Elsea** has been named senior manager; **Christine Kiriazes** has been named research manager; **Oliver Wen** has been named data analyst; **David Krull** has been named senior vice president. The firm also announced several promotions: **Marla Commons** and **Jean Fasching** to senior vice president; **Heather Dallam** to vice president; **Kathy Lubner**, **Olya Gakovic** and **Bruce Jondahl** to senior account executive; **Kathy**

Brewers to account executive; **Matt Hanlon** and **Manish Lulla** to research executive; **Michelle Montalvo**, **Roy Persson**, **Jenny Matsui** and **Becky Parke** to senior research manager; **Nyssa Packard** to research manager; **Elena Izakson** to senior marketing director; and **Brandi Blades** and **Oliver Pangborn** to senior marketing manager.

At *SPSS Inc.,* Chicago, **Alex Kormushoff** has been named senior vice president of worldwide field operations.

Norwalk, Conn., research firm *IMS Health* has named **Kevin Knightly** senior vice president, business line management, a new position. Previously, he was president, Europe, Middle East and Africa (EMEA) for IMS. Succeeding him as president, EMEA is **Adel Al-Saleh.**
Disney Channel Asia-Pacific has named **Daniel Shum** to head up consumer strategy and research as vice president.

Newport News, Va., property firm the *Mumford Company* has named **Greg Fortemps** sales analyst in its Chicago office. Market research will be among his responsibilities.

Tinny Marie Seabolt has been named marketing and research director for *Muskogee Development*, Muskogee, Okla.

Raimund Wildner, managing director of *GfK-Nürnberg e.V.* and head of central method and product development for the GfK Group, has been named Market Research Personality of the year for 2007 by the Berufsverband Deutscher Markt- und Sozialforscher e.V., an association of German market and sociological researchers. Separately, GfK announced that the appointment of **Christian Weller von Ahlefeld** as CFO and management board member with responsibility for human resources of German research firm GfK AG has been extended by a further five years.

Reston, Va.-based *comScore* has named **Josh Chasin** chief research officer. Separately, the firm has named **Marvin J. Pollack** senior vice president of marketing communications.

New York-based *Arbitron* has named **Claudine Knisley** director of syndicated standards and analysis and tapped **Joel Zaremby** to be senior account manager for Project Apollo.

BIGresearch, Columbus, Ohio, has named **Holly Williams** vice president of sales. She will manage the firm's new New York office.

2007

Customer Satisfaction

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Trade Talk

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high-level position to oversee all proactive company communications with customers. Southwest's Fred Taylor coordinates the information sent to the airline's employees during major flight disruptions but is also responsible for sending out letters and flight vouchers to customers who had to endure storms, air traffic backups or other problems – even those outside of Southwest's control.

But it's not enough to merely respond quickly. As anyone who has submitted a complaint online can attest, receiving a boilerplate e-mail back from the company acknowledging receipt of your comment and a promise to get back to you certainly does little to smooth ruffled feathers. And in fact, this practice can backfire if a satisfactory resolution is never offered, as not only has the company admitted it received the complaint but then it clearly demonstrates that it doesn't care enough to follow through.

Responses like Southwest's – targeted, specific and bearing something of value or meaning for the customer – should now be the standard.

Employee loyalty

As disparate as the *BusinessWeek* list is – it includes automaker Porsche and outdoor gear retailer Cabela's – the firms on it pair their focus on customer service with a commitment to employee loyalty. Efforts to please workers range from encouraging employees to borrow and review store merchandise (as Cabela's does) to awarding millions in scholarship money (a practice of grocer Wegmans).

Most also insist that executives log or have logged some time working in the trenches or at least have regular contact with those who do. As the article states, "While treating employees right and staying close to the front lines may sound like simplistic platitudes, they're also the hard truth about the hard work of getting service right."

National punch line

Even so-called service champs can take it on the chin. *BusinessWeek* had JetBlue Airways ranked No. 4 on its list until the airline's handling of the February debacle at New York's JFK airport turned it into a national punch line. For a firm that crowed about its customer-friendliness, its blunders set it up for an even bigger fall. (What's that line about living by the sword?)

Still, as a sidebar chronicles, the airline launched a wide-ranging damage-control effort (including a *mea culpa* appearance by then-CEO David Neeleman on the *Late Show With David Letterman*) which one day may serve as a guidepost for other firms that find themselves in similar straits.

Some other interesting tidbits from the article:

• After JW Marriott Hotels switched from paper comment cards to online surveys, responses went up 50 percent.

• Each month, senior execs at Cabela's assemble to listen to customer calls while watching the same screens used by service reps.

• Service reps at insurance firm USAA earned 2006 bonuses of 16.5 percent. Last year the firm added a tool in its call centers to track sales rep suggestions for customer-friendly ideas.

• By 2008, legendary retailer Nordstrom is scheduled to launch a system that enables employees to view a single database of company inventory to help customers track down an item they are searching for.

• At Southwest Airlines, an employee idea led to the practice of gate agents placing color-coded magnetic cards on gate doors to let other employees know when they need help.

Always be improved

As the firms profiled in the article make clear, satisfying customers and responding to their needs is a process that never stops and can always be improved. Indeed, even Nordstrom initially declined to speak with *BusinessWeek*, saying it didn't consider itself an expert in customer service. That very attitude is probably why it, along with others on the *BW* list, will continue to set the standard to which competitors aspire and customers flock. | Q

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trade talk

By Joseph Rydholm
Quirk's editor

Learn from the service champs

Is it possible to be proactive about being reactive? That sounds somehow oxymoronic but after rereading a *BusinessWeek* article on firms that excel at satisfying their customers, I think it might be a key to fostering customer loyalty.

For the article "Customer Service Champs" from its March 5 issue, *BusinessWeek* created a list of firms regarded as serving their customers well, drawing on brands in the database of sister firm J.D. Power & Associates (both are owned by the McGraw-Hill Companies). The magazine also polled 3,000 of its readers to generate a similar list. In addition, J.D. Power surveyed customers about brands that were cited by readers but not already in its database.

The result is an insightful and instructive special report on (and ranking of) 25 companies that are seen as providing top-flight customer service.

The article proves the importance of making good customer service a priority - part of the corporate DNA - and devoting substantial time and resources to developing processes to identify, track and react to service snafus. (In our own pages this month, the p. 32 article on energy company Ameren shows the impact that an organization-wide effort can have on customer satisfaction. It's also an instructive how-to for companies that want to launch a large-scale satisfaction research program.)

Speed is critical

In this business of satisfying customers, speed of response is critical. When service problems crop up, consumers now have myriad ways to make their dissatisfaction quickly known to a company, thanks to e-mail, Web sites and cell phones. And companies have a wealth of options available to respond just as fast.

In the old days, a disgruntled customer might have taken the time to write a letter of complaint and then mailed it in, hoping (likely in vain) to hear back from someone at the offending company within the next few months. In many cases, any remaining reservoir of goodwill within that customer likely dried up.

Now, as the article makes clear, with the technologies available, it's almost inexcusable for a large company to not provide coordinated, comprehensive responses to customer service issues. (Our case history on Budget Rent A Car this month is a good example of the power of a quick response to customer service problems.)

Most of the firms on the *BW* list have invested in systems to track and react quickly to customer complaints. Southwest Airlines, for example, six years ago created a

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