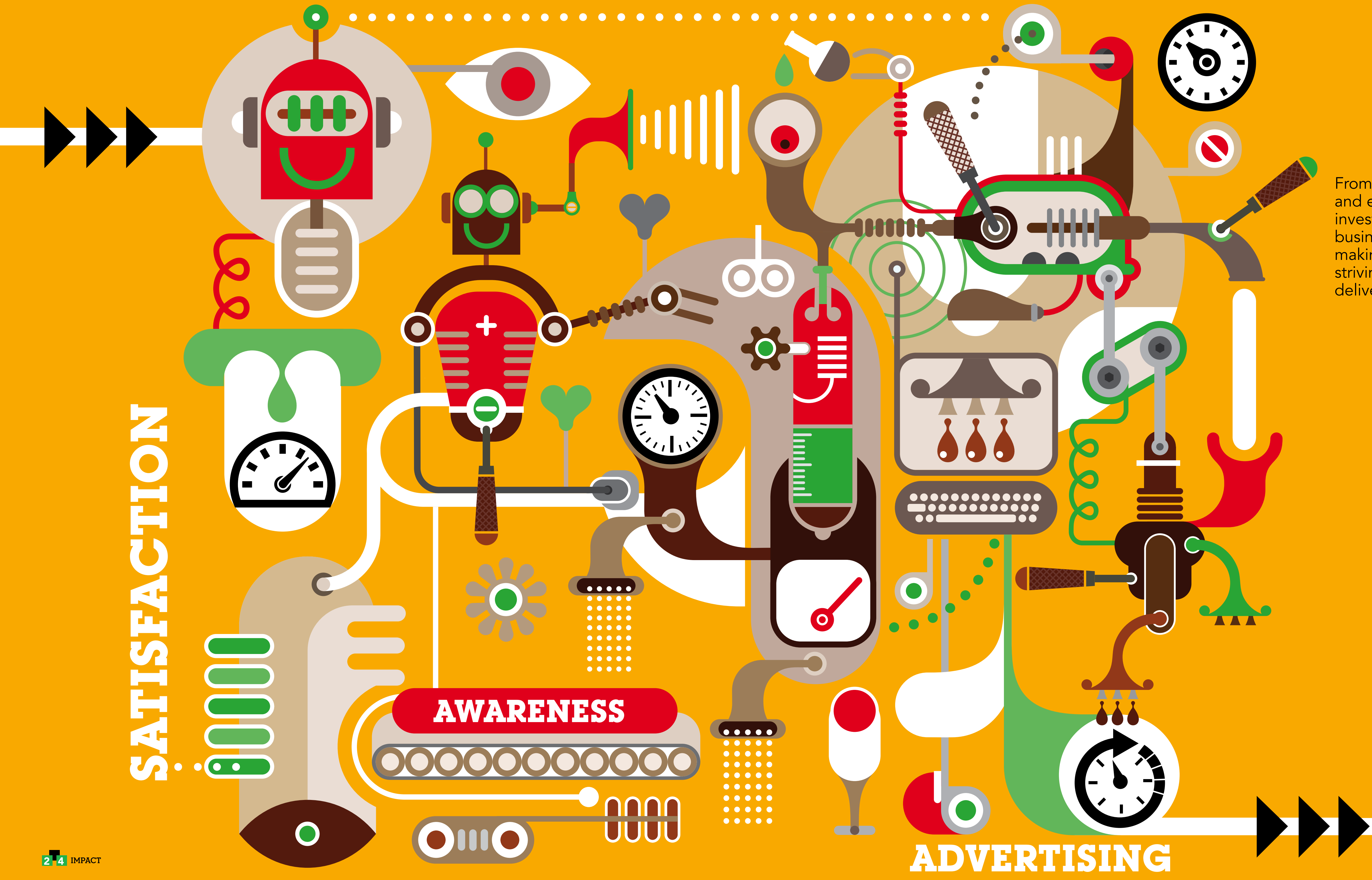
The measure of things



From brand equity, to satisfaction and experience – **Tim Phillips** investigates the role of trackers in business support and decision-making, and how companies are striving to improve their surveys to deliver real commercial value

"One of the most important controversies among marketing executives today concerns the question of brand loyalty," begins an article in the *Harvard Business Review*, outlining how to track the purchasing behaviour of a panel of Chicago households for products such as shampoo, orange juice and coffee over three years.

The data tracks trends within demographic groups and examines the effect of promotions on what the households bought. Measure this data carefully, the article warns us, because in the future asking these questions will be essential for good management.

The article in question – *Brand Loyalty – what, where, how much?* was published in 1956 by Ross M. Cunningham of The Sloan School of Management at MIT. Fifty-eight years later, ongoing analysis of longitudinal customer behaviour is pervasive. Trackers proliferate in research departments, but the potential to influence management ▸

decision-making is still to be realised in many cases.

Cunningham had the insight that, using his hand-written ledgers, measuring a limited number of things repeatedly for an extended period was more useful than trying to measure everything once.

The capacity to track data points has expanded enormously in the half a century that has followed, but often the link to management decision-making has weakened or been broken. As we measure more, it's not often clear that we measure effectively: "There is only a tenuous connection between satisfaction rates and actual customer behaviour, and between satisfaction rates and a company's growth. That's why investors typically ignore reports on customer satisfaction," wrote Fred Reichheld of Bain Consulting in his book *The Ultimate Question*. That's a surprising conclusion from someone who, for three decades, has attempted to measure the business value of tracking customer service.

Ideally, tracking data of any type – brand value, loyalty, sentiment, customer satisfaction or experience – should pass three tests. The first is that it must ask relevant questions, or interrogate the right data. The second is that the statistics created must be capable of suggesting some action or change. The third is that the people who can make these decisions trust that data.

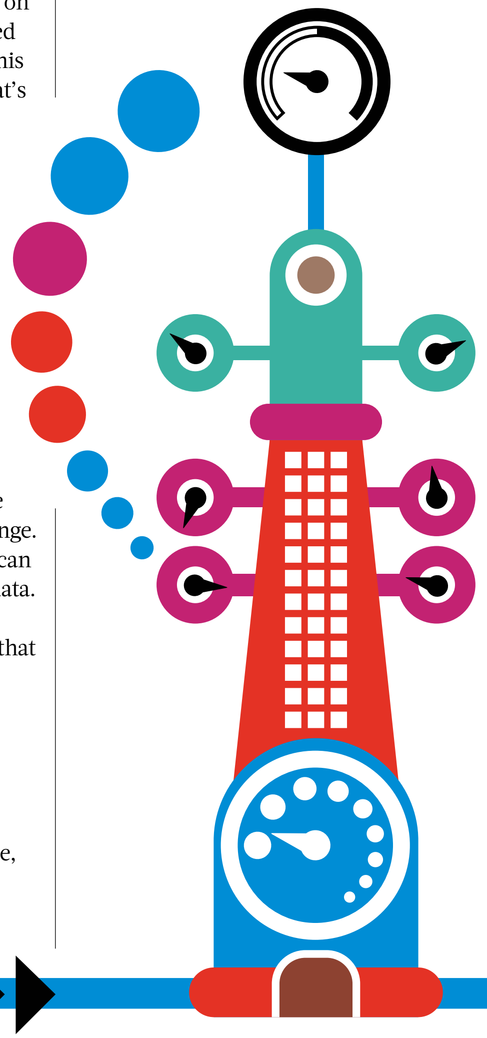
Often, however, trackers are overlong, loaded with questions that will never be analysed, and inconsistently applied to biased samples. Their indicators are aggregated into vague concepts using arbitrary methods, or are relegated to post-justification of marketing. This is understandable, but it wasn't what Cunningham would have expected.

"Today's tracking surveys ask the wrong questions, and they ask far too many of them." That is the conclusion of *The Trouble With Tracking*, a white paper written by Jan Hofmeyr, who created the Conversion Model tracking system for the Customer Equity Company, and who now works for TNS.

Asking the right questions

Those "wrong" questions include irrelevant questions that either aren't relevant to the way the respondent makes a decision, or which don't imply an action, whatever the answer.

The "too many" problem is often the result of success, and the belief that asking more, surely, gives better information. In their paper, *The low stability of brand-attribute associations is partly due to market research methodology*, published in 2008, Sara Dolnicar and John Rossiter of the University of Wollongong investigated the weakness of using brand attribute surveys by asking an attribute association question, featuring 10 brands and 12 attributes. A week later they did the same test again, and found that the same people associated only half of the attributes to the same brands.



We know that boring surveys produce poor-quality data. When that data is measured regularly, small movements in underlying attitudes among important customers might be swamped by noise, or just lost in the inherent instability of asking people to score brands that they care little (and know less) about. Reaction to external factors such as news stories may create false positives – trends that will never be reflected in purchasing data.

Long surveys result from a misguided attempt to measure well. Multidimensional concepts such as customer experience can easily give rise to 'questionnaire creep', as the need to find the 'right' indicator for every business problem trumps common sense.

Finding the most appropriate survey design is one reason the Institute of Customer Service (ICS) is researching how trackers measure customer service, to try to establish best practice. Its report, scheduled for October, will make recommendations based on the successes and failures of its members.

"The measures that businesses are currently tracking are not necessarily the right ones," warns Phil Codling, research and insight manager at the ICS, "Often they are useful, serve a purpose, and get embedded. They are on the company scorecard and are used as part of remuneration packages. As a result, organisations can get into a situation where they are using a measure that doesn't fully reflect the priorities of the business," he says.

He recommends a two-tier process of tracking. On one level you have the 'big picture' questions, or indicators compiled from the questions, which can be used to benchmark experience across an industry, or a type of business. "Below that, insight teams can be working on more operational measures to support them," says Codling. "We are developing a framework for organisations to construct the most appropriate ways to measure customer service performance."

But there is a problem that the new structure will not solve: very often the deepest questions on a tracker will not show instant results. Trackers that jump around from month to month are probably not revealing strategic trends as much as recording what just happened. So the needle that matters might not move very much, or very quickly. "The tenure of a FTSE350 CEO is often not long enough to see the results of investing in customer satisfaction. But, if the businesses don't invest in it, ultimately they will be missing out on long-term performance benefits," Codling says.

Finding meaningful answers

To drive any investment, there needs to be a pattern by which moving the tracker is seen as important for the business in some way. The number must usefully describe the real world, so that trackers imply a strategy or policy.

On the other hand, says Kerry Wozniak, director of marketing,

ARE WE MEASURING WHAT WE THINK WE'RE MEASURING?

Question wording matters when it comes to tracking health service levels and satisfaction

Chris Graham is the director of research and policy at the Picker Institute Europe, a not-for-profit organisation specialising in patient views of healthcare, and using those views to drive improvement. It co-ordinates the NHS national patient survey programme in England.

In 2012, Graham was one of the authors of *Overarching questions for patient surveys*, written for the Care Quality Commission (CQC), which investigated how well survey questions about care quality were working in the NHS. The report found that patients understood one tracking question much more consistently than others: when they were asked to choose a number on an 11-point scale between 'Overall I had a very poor experience' and 'Overall I had a very good experience'. This intentionally nonspecific question had been put in as an off-the-wall experiment, but it confused patients the least.

Q: What were you investigating?
A: There is a desire to harmonise the way we are asking these fairly typical kinds of satisfaction questions, such as 'Overall how do you rate the care you received?' But in different surveys, for historical reasons, we've used different scales on it. We also found that the question itself often didn't work very well; it was very sensitive to context effects, for example.

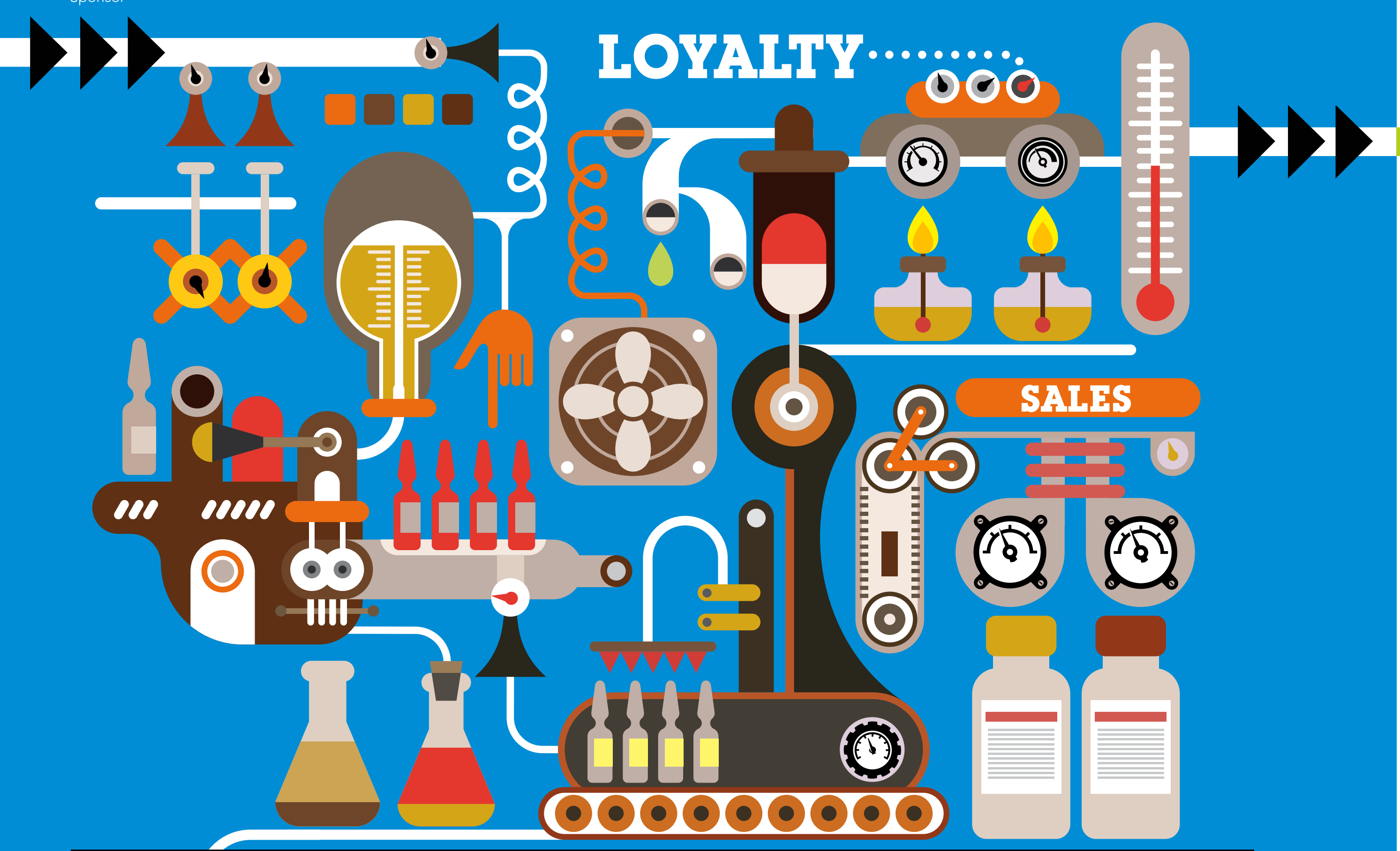
Q: How did you do the research?
A: We wanted to look at something that could be used more consistently as an overarching indication of care experiences, not just in one situation, but across in-patient wards, emergency departments, outpatient clinics and so on. We contacted 85 members of the public over a few months where we undertook a very large number of interviews. We really want to be clear that our questionnaires are measuring what we think they measure – because if they're not, and we issue them to 100,000 people, we've really wasted everyone's time. We looked at six different overarching questions to assess whether people understood them but, more importantly, whether people understood them consistently in different settings.

Q: What did you find?
A: A lot of the questions that we tested didn't work very well for one reason or another. We found, not entirely to our surprise, that people tended to see some questions as being about 'did they get better?' which makes sense.

Q: Did you find questions that successfully differentiated the experience from the outcome, and ones that didn't work?
A: The one that interested most people, of course, was the Net Promoter Score. Although it is very widely used in commercial settings, it simply didn't work for healthcare. It caused all kinds of problems: when we asked if they would recommend their healthcare, some patients were offended, some thought it was quite funny, and some simply did not understand it at all. Very often patients understood our surveys as being about choosing and comparing but, of course, for healthcare services you generally don't want to use more than one.

Q: Ultimately though, you were able to make a clear recommendation.
A: Yes, which is interesting. The question that we eventually used is a very non-traditional one. If the rest of our survey questions are very specific and ask you: 'Did this thing happen or did it not?' we would go for the least specific question that we could think of, and leave the interpretation as open to patients as possible. Frankly I was surprised that the question worked as well as it did.

Q: From your investigation, do you recommend the 'Friends and Family' test [which was introduced to the NHS in 2013, and contains a controversial NPS-derived measure in which patients are asked 'Would you recommend this service to friends and family?']?
A: No. We did our own testing, and it didn't work. There's no standard methodology and every hospital trust collects data in a slightly different way. Predictably, those different ways of collecting it have a massive impact on how people respond. I hear from patients and from healthcare professionals who don't think it works well. It's a numeric tracker that's subjected to many fluctuations and too much impact from psychological variation to be really useful. But I like the qualitative information in the test – it becomes a sort of cultural intervention, making the connection between what patients experience and what staff know about it.



JUST THE TICKET

Nick Bonney on the role and value of trackers at National Lottery operator Camelot

At Camelot, Nick Bonney is doing 500 interviews every week through its agency 2CV. Why does he put such an emphasis on tracking studies? Because there's no alternative source of the information he needs.

"Roughly 80% of our business is retail, and there's no way of us identifying those players. We see ticket volumes, we see how many lines and tickets we've sold. But we can't attribute that to individual players. There's also no shared data; there's no Nielsen or IRI or any kind of ePOS data that we can use to get market stats," says Camelot's head of insight.

Tracking data measures the size of the market, the crossover between brands, who's playing, how often they're playing, and how much they're spending. While many brands struggle to establish the impact of tracking data on business performance, for Camelot, it's fundamental, and a large part of establishing the rigour of the exercise is correlating tracker data with sales.

Part of that rigour has been a process of simplification. This predated Bonney's arrival in 2013, but he has continued it. "The businesses had multiple trackers. There was one that tracked the market, one that tracked advertising, one that tracked scratch cards, one that tracked till-based games. There were so many numbers flying around the business that nobody really knew which one to focus on. We consolidated into one single tracking study, which I think has given a much greater focus."

For example, one of Bonney's innovations has been to formalise the questioning on frequency of play; rather than asking people how often they played, it asks whether they played last week, and poses specific questions about that event. The result? An improved correlation to sales in the studies, and better confidence from management in the trends tracking data produces.

Another exercise has been to trim the tracker, and resist what he calls "the dreaded questionnaire creep". Each question is subject to scrutiny: what would the business do with this information, whatever the result? If there's no clear answer, the question is taken out. Respondents are also not overtaxed. With a large and representative sample, none do the whole survey.

"We have a section at the beginning that every customer answers. We have a selection at the end that everybody answers. The middle is where we stream people down to two or three modules."

The value of trackers? Bonney is in the fortunate position that he can see almost instant correlations between tracked activity and sales volumes.

In his previous job (at EE), the value of trackers to the business was harder to measure: he recalls that the value of trackers was sometimes more based on belief than a demonstrated commercial impact. "If the bulk of the value in the market was tied up in three-year contracts, then it's never really going to flow through in the market share, because you might have another 15 months left on your contract. There's less relationship in those kind of tracking studies between the planned intent and actual sales. It's harder then to maintain the credibility because the CFO asks, why does it matter?

"Here, at Camelot, we worked really hard to try and put financial values on it. It's the only way that people will sit up and take notice of the tracking study."

Verizon Wireless, "Too many executives fall into the trap of over focusing on moving the score." Of course, that's natural, she says: "Executives get paid to improve numbers." The problem, common to almost all users of trackers, however, is that the scores become detached from the business that they attempt to measure; there is a temptation to make the number move, rather than to change the underlying business.

> The measures that businesses are currently tracking are not necessarily the right ones

Trackers must either compare the business to its own past, or benchmark it against its peers, and then display the information in a meaningful way. To do this, they have to measure regularly the same things using consistent methods. In some important cases, this is clearly not happening.

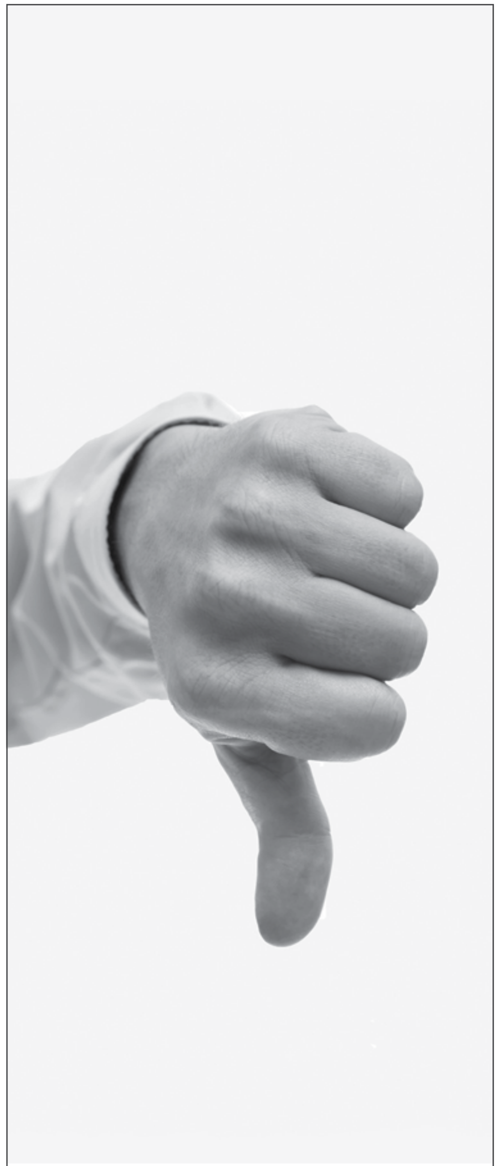
"Unfortunately we had not factored in how the data would be 'interpreted' by NHS Choices. This turned our good results into very bad results indeed," wrote Helen Ryan, director of nursing at Yeovil District Hospital Foundation Trust, in the *Nursing Times* in September 2013.

She was commenting after the publication of the first round of 'Friends and Family' tests in the NHS (see: Are we measuring what we think we're measuring?, p27), designed to create an annually updated league table of customer satisfaction. With 95% endorsement from her patients, she was expecting a good result. But, after calculating the league tables, the headline in her local newspaper was that her hospital was 'among the worst' trusts in the country. It had fallen in the lower part of the table, but the test failed in three ways: subsequent research shows that NHS patients were unsure what they were being asked; data was collected using different methods, response rates and sample selection in different hospitals, and different types of hospital were being compared using the same benchmark.

Ryan is still upset over the effect on hospital and patient morale. "It may only have been our local paper, but it is extremely widely read," she says, "If you Google 'Yeovil Hospital', on the first page it still says we are 'rated among the worst'."

She admits to a feeling of "deja vu" as NHS Choices starts asking hospitals to collect staffing data for another table of performance. But data quality problems persist, not least because many hospitals have manual processes for recording staffing, while some are using people with little experience of data collection, and hospitals effectively audit themselves.

Ryan has no problem with comparative tracking in a peer group, or longitudinally for her



hospital, but she believes that the tracking data is not being presented in a way that creates better patient care. "You can compare us with about 10 or 12 other hospitals of a similar size – I like the ethos that we should do a baseline and improve. But everyone wants to see a league table," she says.

Comparisons of multidimensional concepts like satisfaction or experience across different types of organisation also require aggregation of indicators, or simplification into a single survey response. This can help focus our attention, but the way in which the question is asked – or the numbers are added – matters.

For example, the well-regarded ICS index of customer service, called the UKCSI, is a cross-industry benchmark made up of 28 separate indicators. The weight which any aggregate index gives to each indicator must be subjective, because components are incommensurate by definition.

> If managers simply ask whether the score went up or down, the tracker may not be doing the right job

When agencies protect their method of aggregation, it may create a problem ascribing meaning to a movement in an index – the sort of problem that Tim Jude at B&Q complains of (see The do-it-yourself approach, p32). Yet there are many trackers sold as a pre-aggregated service. The advantage of a third party is that the information going into the aggregate is as consistent as possible across many companies; the disadvantage is that an index ultimately measures only itself, whatever it is called. We must hope that it is a good proxy for what we want to measure, but we can't be sure.

At Verizon Wireless, Wozniak's acid test for deciding whether tracker information is providing meaningful numbers is to listen to the questions that management are asking. If they look at the tracker and ask about the customer issues that have created the numbers, the data suggests a real-world meaning. If the managers simply ask whether the score went up or down, the tracker may not be doing the job for which it was created.

Acting on results

When the measurement is rigorous, and when the numbers can be tied to the real world, there are still many ways to act on the same information. This is an argument both for, and against, the Net Promoter Score (NPS), perhaps the single most tracked non-financial statistic in business.

NPS was developed in 2003 by management consultants Bain researching which questions best correlated with referrals and repeat purchases in 14 industries. When asked: 'How likely are you to recommend to friends or family?' on a scale of 0 to 10, scores of 9 or 10 are promoters, and 6 and below detractors. Subtract the latter from the former, and you have a single number, which its many supporters consider to be extremely powerful.

NPS in its pure form, as with similar trackers, is designed to be part of a 'closed loop' system – it must be mandated and used by senior management to drive decision-making. In reality, this is not always the case. Where it is used strategically, it claims remarkable success not only because higher NPS correlates to higher growth, but also because it has the flexibility to be a strategy tool in many ways.

The tracker "helps us to prioritise important activities," says Roblyn Theodorou, director of client development and satisfaction at technology services company CSC. Her management team uses it to prioritise projects, based on where they are effective. "It helps us slice and dice the customer experience and discover which parts of the business rise to the top, and what would help us improve," she says of her tracker, managed by Medallia.

Results are taken sufficiently seriously that executive bonuses are partly decided by movements in the NPS in specific departments, Theodorou says. But she is also aware that you can't simply use it to compare different parts of the business, or one country with another, because different cultures and types of activity will have different base scores.

> The results show that absolute rises in satisfaction show little correlation to gains in market share

Not everyone is as bullish about NPS and its applications. Lerzan Aksoy, an associate professor of marketing at Fordham University, is one of a group of academics and practitioners, including Tim Keiningham of Ipsos MORI, who have published research (most recently, The High Price of Customer Satisfaction in the *MIT Sloan Management Review*) that casts doubt on the satisfaction measures used in the tracking industry. Their econometric tests use large samples to correlate rises in NPS, and other common customer experience indices, against market share.

The results show that absolute rises in satisfaction show little correlation with gains in market share. On the other hand, relative rises compared with a peer group are much more predictive. It's not the absolute satisfaction that counts, it's where you are in the satisfaction pecking order. (One of the creators of NPS disputes the way in which these results are obtained, however. See Q&A with Bain's Rob Markey, below).

It's not that the data isn't collected well, or that it doesn't represent a rise in average satisfaction. It's just

"ANY METRIC YOU USE MUST MATCH THE BEHAVIOUR YOU ARE TRYING TO MOTIVATE"

Rob Markey, head of Bain's Customer Strategy & Marketing Practice, helped devise and implement the Net Promoter System in 2003. He is the co-author, with Fred Reichheld, of *The Ultimate Question 2.0*, which describes how to implement Net Promoter Score (NPS) trackers

Q: Loyalty and satisfaction trackers are now pervasive. Are they over-used, or used inappropriately?
A: Any metric you use must match the behaviour you are trying to motivate. The core objective of what we do is to motivate cultural change and improvement on behalf of customers, so we have to start by asking, what decisions are we trying to unlock? Are we trying to figure out which products to offer; their pricing; who has needs that aren't being met; where are we winning?

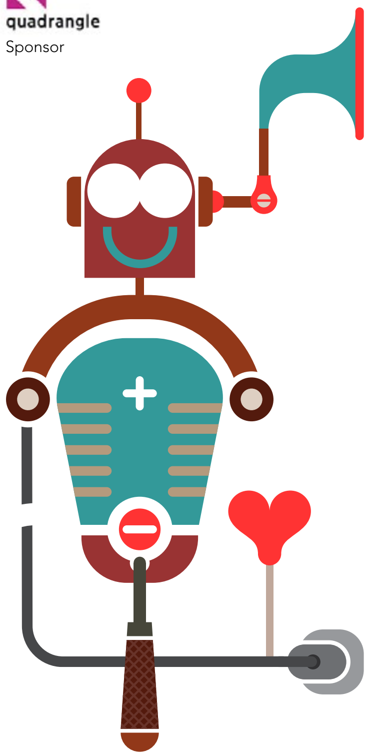
Q: But there are studies (see above) that appear to demonstrate that changes in absolute customer satisfaction measures, such as NPS, do not predict business outcomes – so the changes you make as a result of tracking might be wrong for the business?
A: There are many studies of NPS – some of them confirm what we say about its effect on the business, and some of them call it into question. To put it in context: there is more than one way to use NPS. In 2003, when we started, we really didn't know how to articulate this clearly, but there are three types of reporting you can do. The first is competitive benchmarking, which is traditional market research and must be an apples-to-apples comparison. This type of research is the basis of our prediction that raising your NPS is correlated with your growth rate.
The second is relationship NPS, in which you gather information from your own customers, and attempt to close the feedback loop. The third is experience-triggered NPS, which you would use after a purchase or a new account opening.
People are sometimes a little sloppy when they analyse the relationship between NPS and growth, because they put all these tracking studies together. They try to compare the effect across companies when what these companies are trying to achieve is just not comparable.

Q: You say that it is important to benchmark your competitive NPS relative to direct competitors, because different industries have different base levels of satisfaction or recommendation. But, by doing the research in different ways, you can also achieve a large variation in the results. So are comparisons of third-party research inherently unreliable?
A: In financial reporting, it is equally possible to create a misleading set of results, but the difference is that there is an accounting profession with the weight of the law behind it. Only when there is a standard way to measure can we start to establish clarity about what is a reliable metric. That's the advantage of having a large open-source community for NPS: it can develop and promote its own reporting guidelines to make the standard reliable.

Q: Is tracking a single number over-simplifying?
A: I travel a lot. My inbox is filled with solicitations to fill in long feedback questionnaires from the places I've stayed. They seem to ask me everything except the thing that matters to me. The industry is abusing relationships with customers in a misguided attempt to provide false precision in decision-making. We say we want 'actionable' information, but often that's just a code for 'too much detail'.

Q: Do you sometimes see bad implementations in which this information is not being used, and wish they had asked your advice before starting the research?
A: Yes, often. Let me explain it this way: no one has ever become stronger simply by measuring the circumference of their biceps. The same thing happened with six-sigma or re-engineering: people wish they could get strong just by measuring things, without closing the loop. They can't.

Q: But many insight managers struggle to encourage the board to use customer satisfaction and loyalty trackers in their decision-making.
A: If the senior leadership doesn't believe that customer loyalty is central to the success of the organisation, why even measure it?



that, in isolation, the research suggests trackers are not a useful basis for decision-making. "We need to rethink the way we engage in the tracking process," Aksoy says. "Usually, a consultant adopts the measures without really thinking them through."

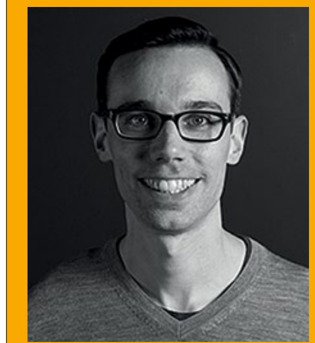
In comparison, she proposes a "wallet allocation rule", which Aksoy and her colleagues developed to emphasise comparative satisfaction in a sector.

If comparative trackers are the best basis for decisions, this suggests an enhanced role for third-party trackers to benchmark a business against the competition. This isn't always possible: some companies, like Camelot (see Just the ticket, p28), have no comparisons except with previous performance. Government services do not fight for market share. In those cases, trackers need to be both carefully designed and cautiously applied.

Some of the problems with trackers might be due to the idea that, when we measure, the improvements will follow. But rather than fixate on particular methods or numbers, says Giles Finnemore, research and insight consultant at the British Video Association (and who for 12 years worked to build customer satisfaction into trackers at the Royal Mail), better to prioritise the process to act on information provided by tracker insight. He explains that trackers give a clear indication of the priorities for improvement. Next time you look at the data, you can see whether the improvement was successful,

THE DO-IT-YOURSELF APPROACH

Tim Jude on B&Q's mission to build a better business tracker



"We want to step closer to the business issues, and produce some integrated customer experience management," says Tim Jude, customer experience manager at B&Q. In the last two years his role has been evolving to match the evolution of the company's insight function. Formerly involved in research, Jude has rapidly moved from being an insight partner, through to customer experience management. Part of his remit is to use B&Q's tracking studies more strategically, to try to drive change in the business.

This is not without problems: most importantly, that trackers created to serve individual business functions, or answer ad hoc questions, do not naturally knit together to create a single, strategic pool of insight. "One of the hardest problems to solve is that our trackers were all built for the original stakeholders – so when you have our NPS, or our customer satisfaction measures, all of a sudden they don't nest together," he says.

B&Q has a store survey, an online exit survey, satisfaction surveys on home delivery, installations and its other services. It tracks social media inside the marketing team and contact centre activity in that team. It's not a problem that too little is being measured, but that the tracking activity doesn't add up to a greater whole.

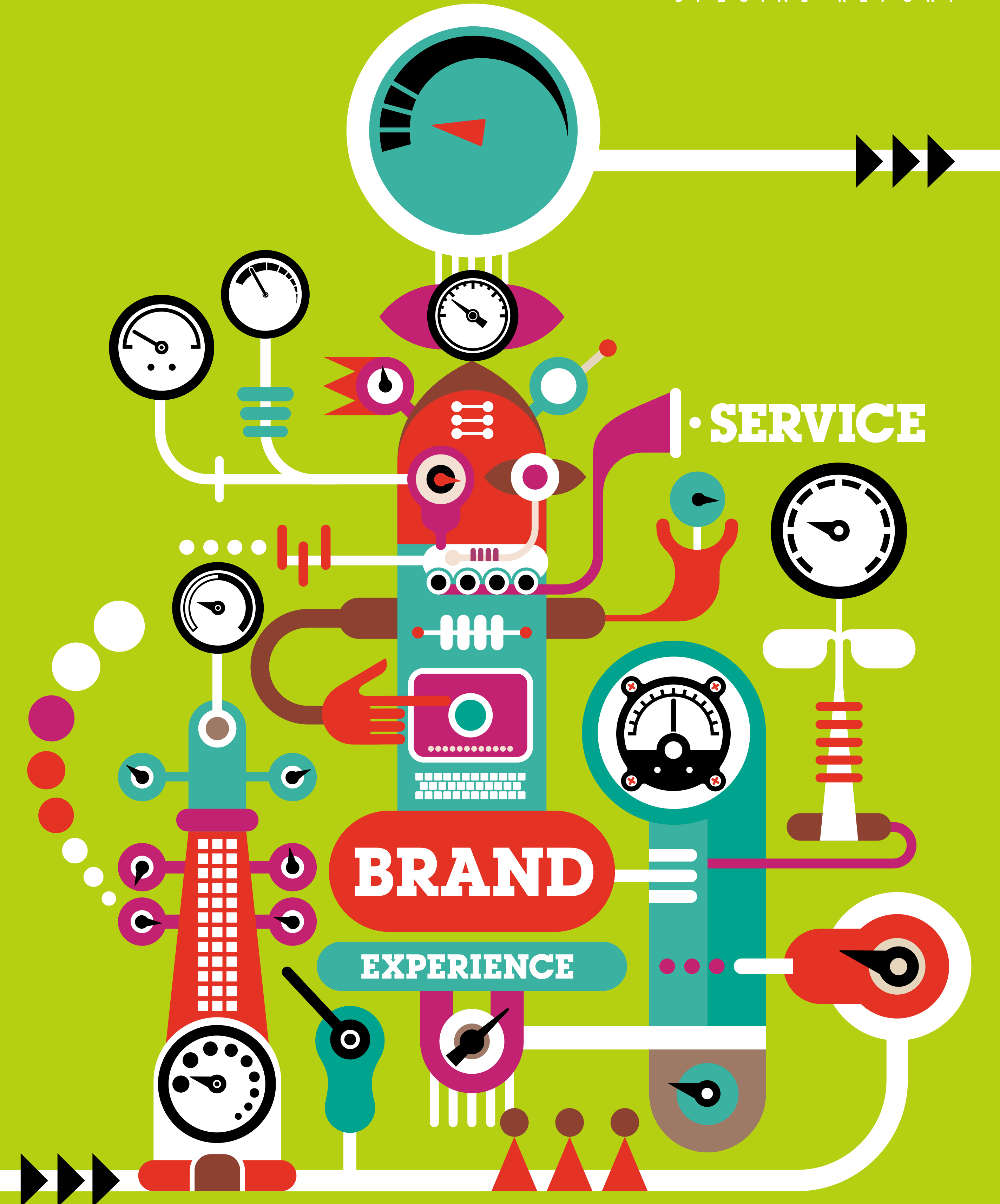
There are several reasons for this. An important factor has been that B&Q has surveyed a lot of customers at the end of the sales process, and asked them to reconstruct their experience. But, as Jude points out, purchasing a kitchen may have taken a year. Meaningful tracking would mean tracking every part of the customer journey, every touchpoint.

Integration would also have to uncover deeper trends in persistent results. A consistent piece of feedback in B&Q's tracking studies is the desire from customers in store for more staff. Yet, as Jude points out, this basic piece of quantitative research may suggest the wrong solution: adding more staff would be expensive, and an underlying problem might still exist. In this case, as Jude says, it may simply be that the display is confusing. Jude has counted 1.7 million separate pieces of unstructured feedback in the past year, and would love to be able to incorporate some type of automated analysis of that into tracking.

Integrating trackers would help set the management agenda. "We need to sort our priorities effectively. If we are tracking buzz or noise around the brand, it doesn't give a clear weight of importance to which things make a difference to our target customers," he says. "Concentrating that communication, getting it fed into the right forums at the right levels to make change – that will bring about the financial payoff."

His biggest headache? Agencies "trying to sell a black box solution and fit that into our business". Standardised tracking measures don't fit B&Q's complex, multichannel trading model. While standardised models can provide benchmarks across sectors, and may be cheaper to run, Jude's plan to integrate tracking with management decision-making is pulling him in a different direction, resisting the temptation to oversimplify.

Measuring the effect of satisfaction on the business is a "work in progress" in his words, not least because DIY retail is affected by many other forces that make a causal link almost impossible to measure. "We're a mass market retailer that naturally attracts a vast range of customer types. The frequency they visit varies hugely, as does their level of skill. They do countless different DIY projects – sometimes planned, sometimes in an emergency – but usually requiring a lot of help from us and our colleagues. Just when we start to get a grip on all of those things, the sun unexpectedly comes out, drives them into store and makes their behaviour incredibly unpredictable," he says.



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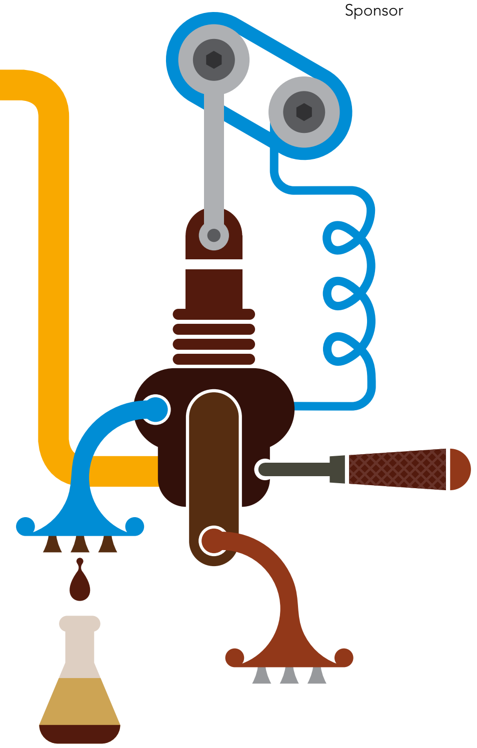

and reassess your priorities.

That can't be done without a mandate from the top. "To me, really, the only place to start is at the top, because if you've got a CEO who will champion it, then you'll get other people championing it too," he says.

His experience, both as a practitioner and as a director of AURA, the organisation of clientside insight professionals, suggests that even calling a tracker a 'tracker' is a bad start, because it does not suggest future action: he prefers to think of it as a 'customer experience programme'. This, he says, should be pushed strongly by a capable agency, whose job goes beyond simply updating results to routine questions. The agency should be part of closing the loop, he says, to be present in the discussion of what the moving indicators signify. "When the research agency comes in, usually it'll do a debrief and then when you're just about to have the conversation about what to do next, as a direct result of this research, you show it the door," he says. His advice for agencies: use knowledge of the tracking data to stay in the room and contribute.

A tracker that has robust measurement and stable indicators, that is transparent and meaningful, will not be any use unless it is consistently acted on. A tracker is not a magic bullet, Finnemore warns: "Focus on what customers tell us they want us to do. Let the number take care of itself." ∎

END NOTES

A sea change in tracking: preview of current research by Quadrangle

The use of Tracking Studies as a way of monitoring movements in (usually) customer views and behaviours has been commonplace for nearly half a century.

For most of that time, little happened and trackers became one of the dull-but-worthiest corners of the research industry. Suddenly, in the past few years, all that's changed.

A combination of the explosion in multi-channel behaviours, the ability to connect tracking with transactional data and the transformational impact of digital – both technologies and as a source of data – is fundamentally re-defining the nature, role and value of tracking.

We think tracking is now the most exciting and challenging new frontier in the research world and much of our work with clients involves pushing the boundaries of what's done.

Earlier this year, we set out to explore how widespread this view is among clients, and the extent to which this is changing the way they think about and use trackers. Below is an early preview of what we're finding in our research. Overall, a sea change is happening in the way clients think about, and use, trackers. This is evident in seven big themes:

- **A growing tension between tracking a few big numbers** – most usually, NPS – and using continuous customer feedback to both refine strategy and guide tactics. This reflects two distinct ways of seeing the value of research: as a metric or as a tool.
- **A near-universal imperative to get smarter at tracking** across multiple channels and at reporting, often in near-real time. Hand-in-hand with a need to manage costs, this is creating a willingness to embrace 'non-traditional' data collection methods. Nearly all of these are digitally-based, cheaper and (though this is whispered, not shouted) more problematic in terms of, for instance, sampling confidence and linking disparate data sources.
- **An increasing sense that surveys should not seek to measure everything**, but focus more on the things that are most important. A good example of this is trackers that are organised around the handful of customer journeys which are critical to driving for example satisfaction, loyalty or spend. The corollary is that clarity about which drivers are most important is a key feed in to tracker design – often from separate research.
- **A growing desire to connect trackers to other research and customer feedback** – and particularly social media. A new model of 'asking and listening' is emerging and, for all the early challenges it brings, is one of the most exciting developments in tracking for many years. Sat beneath this is an emerging view that, at some level, all research is part of a bigger story and the core challenge is to join insights together to build deeper, more actionable understanding for the business.
- **A growing desire to connect trackers to other data sets**, particularly transactional data. Research is great at helping us understand why people do things (and, by extension, how we might influence them); data is great at helping us see what people do (and the £-value of this). It follows that linking trackers and transactional data together creates a uniquely powerful commercial tool and our research confirms that this is now being done – in differing ways and to differing degrees – by clients across multiple sectors.
- **A growing desire to connect trackers to £-outcomes** and to operations. The 'holy grail' of tracking studies is to directly link what is being measured to commercial outcomes and/or to operations. Compared with five years ago, a great deal of progress appears to have been made; looking forward over the next five years, the general view is that this will become an increasingly-core imperative.
- **An underlying fear of 'too much'**. Too many options. Too much data. Too many data sources. Too frequent feedback. And so on. Two key challenges fall out of this: how to distinguish 'the signal' from 'the noise'? And how to bring it all together in a way that not only tells the 'true' story, but also helps prioritise action and improve performance? Together, these two challenges define the new frontier of tracking.

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