

NOVA INCORPORATED: CASE C
RESULTS OF A WORLDWIDE MARKET
RESEARCH STUDY

Working Paper #704

Dennis G. Severance
The University of Michigan

and

Jack Muckstadt
Cornell University

Dennis G. Severance, Andersen Consulting Professor, Computers and
Information Systems, The University of Michigan.

Jack Muckstadt, Professor and Director, School of Operations Research and
Industrial Engineering, Cornell University.

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The University of Michigan
School of Business Administration
Ann Arbor, Michigan 48109-1234

NOVA INCORPORATED: Case C
Results of A Worldwide Market Research Study

As much as anything, it had been the Born Again Marketing Task Force report that had convinced John Fisher of the urgency of revamping Nova's marketing strategy and logistics systems. The market survey of current U.S. customers concluded that Nova was unlikely to gain market share through price reductions because competitors could simply match them. It found, however, that U.S. customers were very sensitive to improvements in product quality and delivery reliability. And if improvement in these dimensions could be achieved, they would be difficult for competitors to duplicate.

The recommendation that emerged from the Marketing Task Force in 1991 was a plan to prune the product line to 10 products by dropping 12 low volume parts that constituted just 5% of total sales. The task force proposed that Nova hold current prices on the modified product line and guarantee that defect free product would be shipped FOB from regional warehouses to any customer location on 24 hour notice with an average fill rate of 99%. They felt that if manufacturing and distribution could deliver on the marketing guarantee, Nova could quickly reacquire the market share that the company had lost over the past 12 years.

While Fisher realized that the task force's market data had been informally compiled and that it reflected only the market conditions in the United States, he believed that the task force recommendations were directionally correct. He therefore embraced their proposal, making their recommendations corporate goals for 1992. At the same time, however, he contracted with a market research firm, Market Opinion

Associates (MOA), for a worldwide study of Nova's current and potential customer base.

The MOA market survey was recently completed and a summary of preliminary data has been received. These data derive from personal interviews and questionnaire responses from users in all current key customer accounts, from a sample of smaller Nova accounts, and from large customers of Nova's key competitors. Four important new facts were uncovered. First, there are five service areas of major importance to customers. Second, not all customers consider the same areas of service to be most important. Third, customers in different regions of the world have different service concerns. Fourth, service performance for the same area of service are different in different parts of the world.

The five types of service identified as most important by the study are:

1. Price (net of all discounts).
2. Timeliness and consistency of service (rapid and reliable resupply times).
3. Range of product line.
4. Technical assistance available both before and after sale.
5. Product quality as measured by reliability, durability and functionality.

Data corresponding to these five categories were collected from each of Nova's sales regions and are presented here in the Appendix. Because of the large number of respondents in North America and Europe, data from these regions were subdivided by large volume customers and medium and small volume customers. Two types of questions were asked. The first type was associated with the relative importance of each service area to the responding company. The second asked for a rating of Nova's

current performance in each area of service. The scales used by the respondents are shown below.

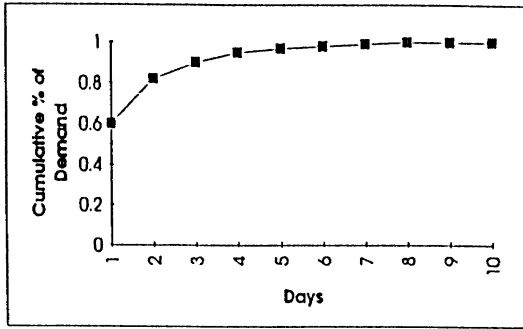
SCALE	IMPORTANCE RATING	PERFORMANCE RATING
1	Critically Important	Exceptional
2	Very Important	Good
3	Important	Neutral
4	Somewhat Important	Needs Improvement
5	Irrelevant	Unacceptable
6	Don't Know	Don't Know

Each service was rated as being Very Important through Irrelevant by each company, while performance was rated as Exceptional through Unacceptable. The numbers in the summary tables of the Appendix are the percentage of respondents in each category.

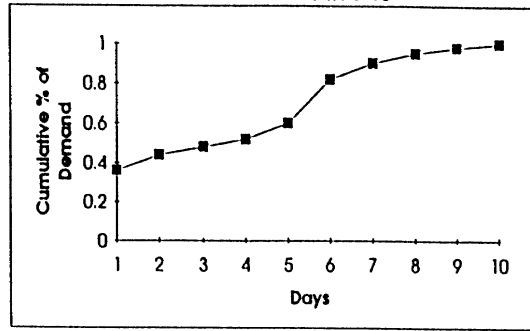
The Survey also showed that timeliness-of-service-required differs by region and by part number. Part numbers 1 and 2 had more stringent requirements for service in almost all markets. The following graphs show how long customers are willing to wait following the placement of an order. The graphs show the percentage that want one day service (next day), two or less days service, etc. Hence, for example, for part numbers 1 and 2 in Region 1, 60% of the demand must be satisfied in one day, 83% by the end of the second day, 92% by the end of the third day, 97% by the end of the fourth day, 98% by the end of the fifth day, and 100% by the end of the sixth day.

CUSTOMER DUE DATE LEAD TIMES

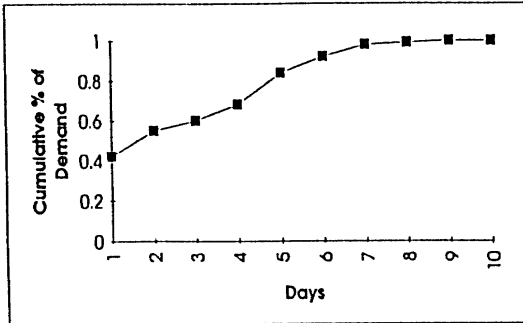
REGION - 1 NORTH AMERICA
PART NUMBERS: 1 and 2



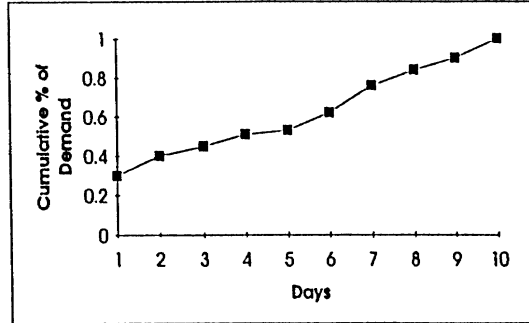
REGION - 1 NORTH AMERICA
PART NUMBERS: 3 thru 10



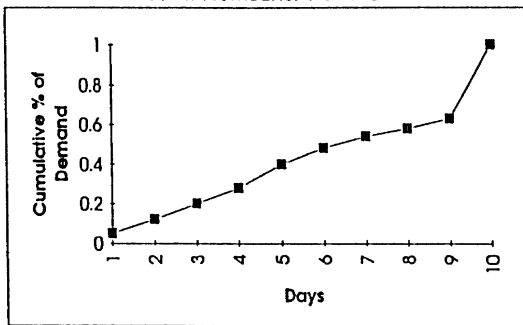
REGION - 2 EUROPE
PART NUMBERS: 1 and 2



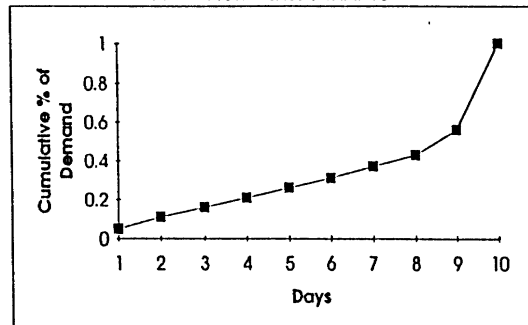
REGION - 2 EUROPE
PART NUMBERS: 3 thru 10



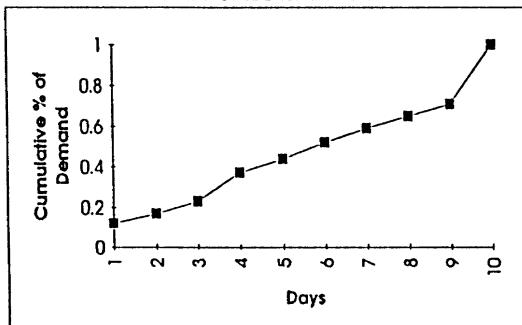
REGION - 3 EASTERN BLOC
PART NUMBERS: 1 and 2



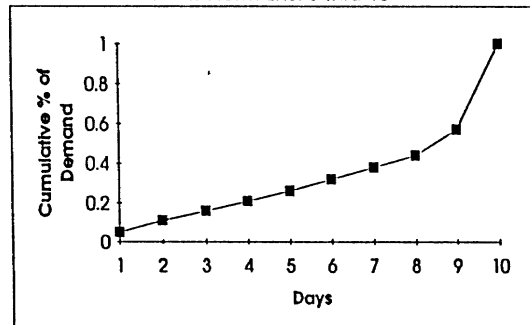
REGION - 3 EASTERN BLOC
PART NUMBERS: 3 thru 10



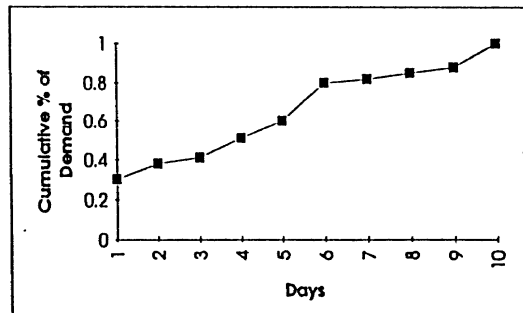
REGION - 4 SOUTH AMERICA
PART NUMBERS: 1 and 2



REGION - 4 SOUTH AMERICA
PART NUMBERS: 3 thru 10



REGION - 5 ASIA PACIFIC
PART NUMBERS: 1 thru 10



ASSIGNMENT

Review the data and summarize the key observations from the MOA market survey for John Fisher.

Appendix
(Respondent Ratings of Service
Importance and Performance)

REGION 1 - NORTH AMERICA

WHAT LARGE COMPANIES VALUE

		RATING					
		Critical		Important		Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	Price	5%	25%	53%	11%	6%	0%
	Timeliness	68%	22%	10%	0%	0%	0%
	Variety	41%	17%	26%	11%	5%	0%
	Tech Asst	35%	26%	11%	6%	22%	0%
	Quality	92%	8%	0%	0%	0%	0%

HOW LARGE COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional		Neutral		Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	Price	65%	21%	4%	0%	0%	10%
	Timeliness	9%	15%	19%	42%	4%	11%
	Variety	73%	11%	4%	1%	1%	10%
	Tech Asst	71%	17%	2%	1%	0%	9%
	Quality	79%	15%	3%	0%	0%	3%

WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

		RATING					
		Critical		Important		Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	Price	14%	31%	52%	3%	0%	0%
	Timeliness	59%	23%	17%	1%	0%	0%
	Variety	44%	21%	29%	5%	1%	0%
	Tech Asst	47%	32%	8%	9%	4%	0%
	Quality	95%	5%	0%	0%	0%	0%

HOW MEDIUM and SMALL SIZED COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional		Neutral		Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	Price	32%	23%	6%	4%	1%	34%
	Timeliness	5%	11%	14%	29%	3%	38%
	Variety	38%	21%	3%	2%	1%	35%
	Tech Asst	52%	14%	6%	2%	0%	26%
	Quality	74%	11%	1%	0%	0%	14%

REGION 2 - EUROPE

WHAT LARGE COMPANIES VALUE

SERVICE TYPE		RATING					
		Critical		Important		Irrelevant	Don't Know
		1	2	3	4	5	6
Price	12%	23%	56%	8%	1%	0%	
Timeliness	64%	27%	8%	1%	0%	0%	
Variety	35%	14%	36%	8%	7%	0%	
Tech Asst	42%	23%	26%	5%	4%	0%	
Quality	92%	7%	1%	0%	0%	0%	

HOW LARGE COMPANIES PERCEIVE OUR SERVICE

SERVICE TYPE		RATING					
		Exceptional		Neutral		Unacceptable	Don't Know
		1	2	3	4	5	6
Price	44%	15%	4%	7%	3%	27%	
Timeliness	2%	14%	19%	32%	2%	31%	
Variety	58%	9%	3%	0%	0%	30%	
Tech Asst	52%	13%	7%	2%	0%	26%	
Quality	64%	17%	6%	0%	0%	13%	

WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

SERVICE TYPE		RATING					
		Critical		Important		Irrelevant	Don't Know
		1	2	3	4	5	6
Price	21%	27%	47%	5%	0%	0%	
Timeliness	48%	32%	16%	4%	0%	0%	
Variety	40%	23%	27%	8%	2%	0%	
Tech Asst	52%	27%	10%	1%	0%	0%	
Quality	91%	8%	1%	0%	0%	0%	

HOW MEDIUM and SMALL SIZED COMPANIES PERCEIVE OUR SERVICE

SERVICE TYPE		RATING					
		Exceptional		Neutral		Unacceptable	Don't Know
		1	2	3	4	5	6
Price	27%	20%	7%	6%	1%	39%	
Timeliness	3%	16%	11%	22%	5%	43%	
Variety	34%	22%	5%	1%	0%	38%	
Tech Asst	41%	19%	7%	2%	0%	31%	
Quality	60%	21%	1%	0%	0%	18%	

REGION 3 - EASTERN BLOC

WHAT COMPANIES VALUE RATING

		Critical		Important		Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	Price	32%	29%	38%	1%	0%	0%
	Timeliness	19%	27%	24%	19%	11%	0%
	Variety	37%	24%	32%	10%	7%	0%
	Tech Asst	61%	30%	9%	0%	0%	0%
	Quality	82%	11%	6%	1%	0%	0%

HOW COMPANIES PERCEIVE OUR SERVICE RATING

		Exceptional		Neutral		Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	Price	17%	22%	6%	3%	1%	51%
	Timeliness	29%	19%	4%	0%	0%	48%
	Variety	42%	8%	6%	1%	0%	43%
	Tech Asst	25%	19%	14%	8%	2%	32%
	Quality	77%	2%	0%	0%	0%	21%

REGION 4 - SOUTH AMERICA

WHAT COMPANIES VALUE RATING

		Critical		Important		Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	Price	41%	27%	28%	4%	0%	0%
	Timeliness	17%	26%	28%	22%	7%	0%
	Variety	31%	33%	28%	6%	2%	0%
	Tech Asst	65%	27%	7%	1%	0%	0%
	Quality	86%	10%	3%	1%	0%	0%

HOW COMPANIES PERCEIVE OUR SERVICE RATING

		Exceptional		Neutral		Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	Price	27%	19%	10%	2%	0%	42%
	Timeliness	33%	18%	4%	1%	0%	44%
	Variety	47%	7%	6%	2%	0%	38%
	Tech Asst	35%	22%	12%	3%	2%	26%
	Quality	82%	1%	0%	0%	0%	17%

REGION 5 - ASIA PACIFIC

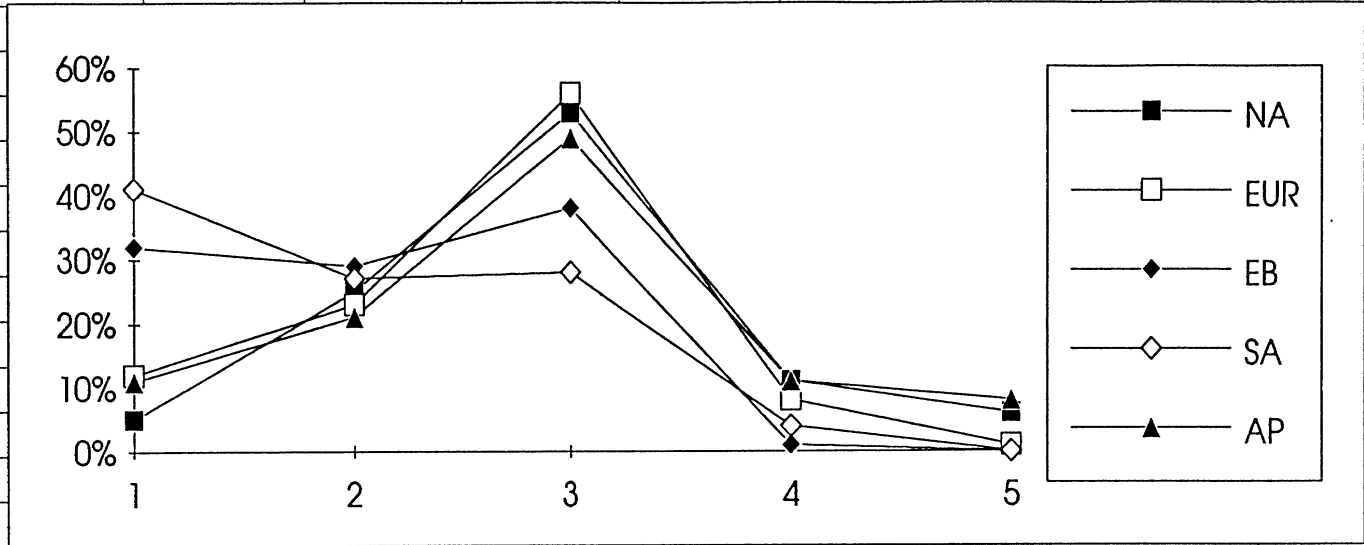
WHAT COMPANIES VALUE RATING

SERVICE TYPE	Critical	Important			Irrelevant	Don't Know
	1	2	3	4	5	6
Price	11%	21%	49%	11%	8%	0%
Timeliness	71%	23%	6%	0%	0%	0%
Variety	43%	14%	31%	10%	2%	0%
Tech Asst	40%	27%	15%	3%	15%	0%
Quality	97%	3%	0%	0%	0%	0%

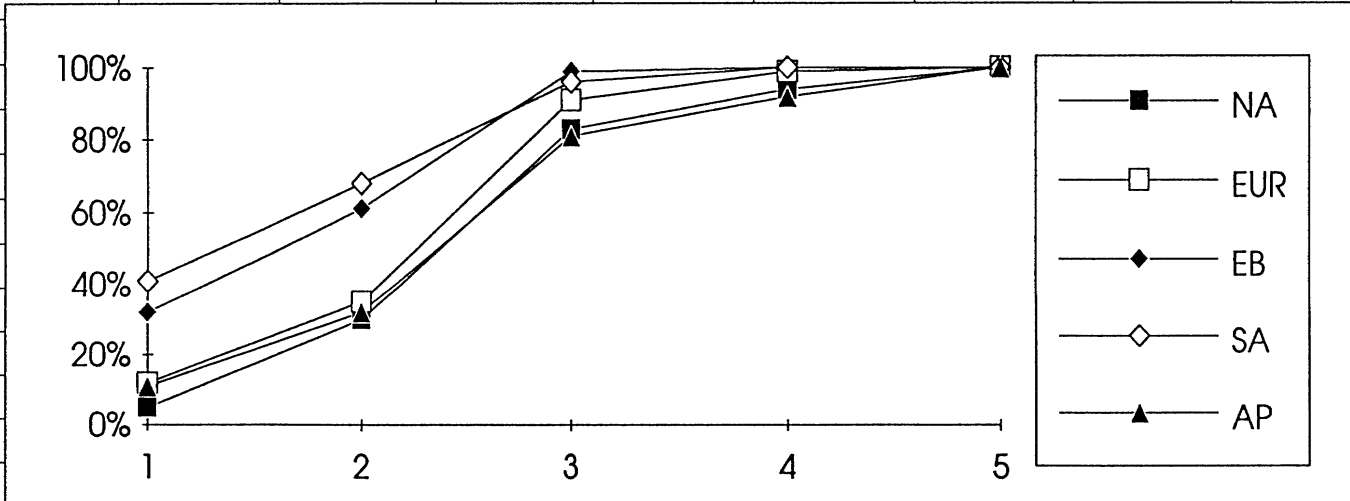
HOW COMPANIES PERCEIVE OUR SERVICE RATING

SERVICE TYPE	Exceptional	Neutral			Unacceptable	Don't Know
	1	2	3	4	5	6
Price	57%	12%	4%	1%	0%	26%
Timeliness	13%	15%	10%	36%	1%	25%
Variety	59%	9%	5%	0%	0%	27%
Tech Asst	68%	11%	4%	2%	0%	15%
Quality	75%	10%	5%	1%	0%	9%

WHAT LARGE COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
	NA	5%	25%	53%	11%	6%	0%
SERVICE	EUR	12%	23%	56%	8%	1%	0%
TYPE	EB	32%	29%	38%	1%	0%	0%
Price	SA	41%	27%	28%	4%	0%	0%
	AP	11%	21%	49%	11%	8%	0%

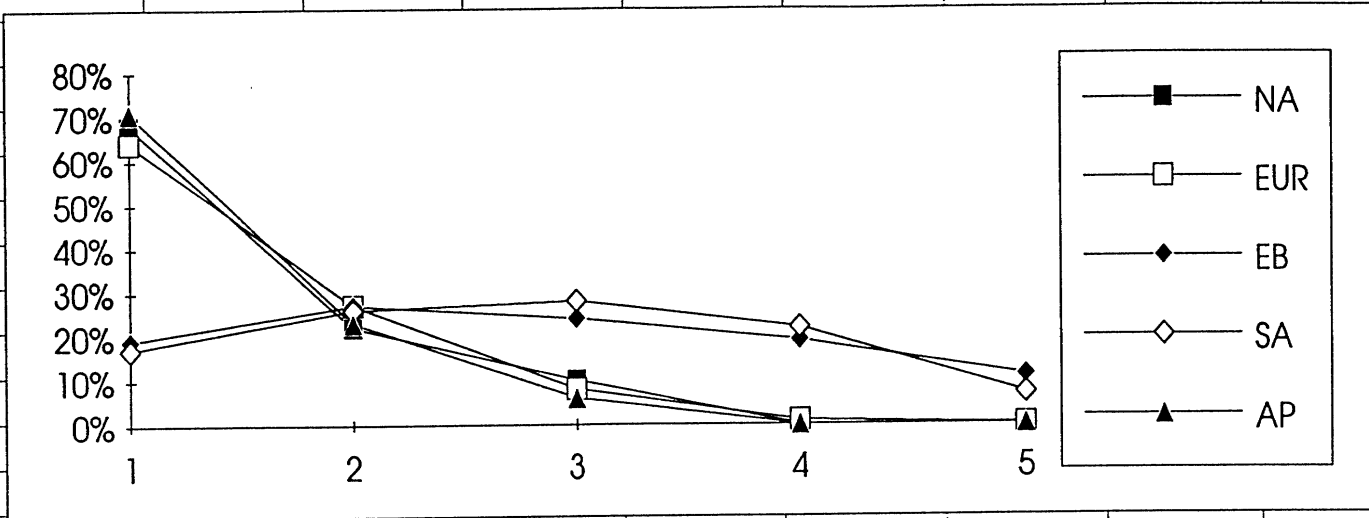


WHAT LARGE COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
	NA	5%	30%	83%	94%	100%	100%
SERVICE	EUR	12%	35%	91%	99%	100%	100%
TYPE	EB	32%	61%	99%	100%	100%	100%
Price	SA	41%	68%	96%	100%	100%	100%
	AP	11%	32%	81%	92%	100%	100%



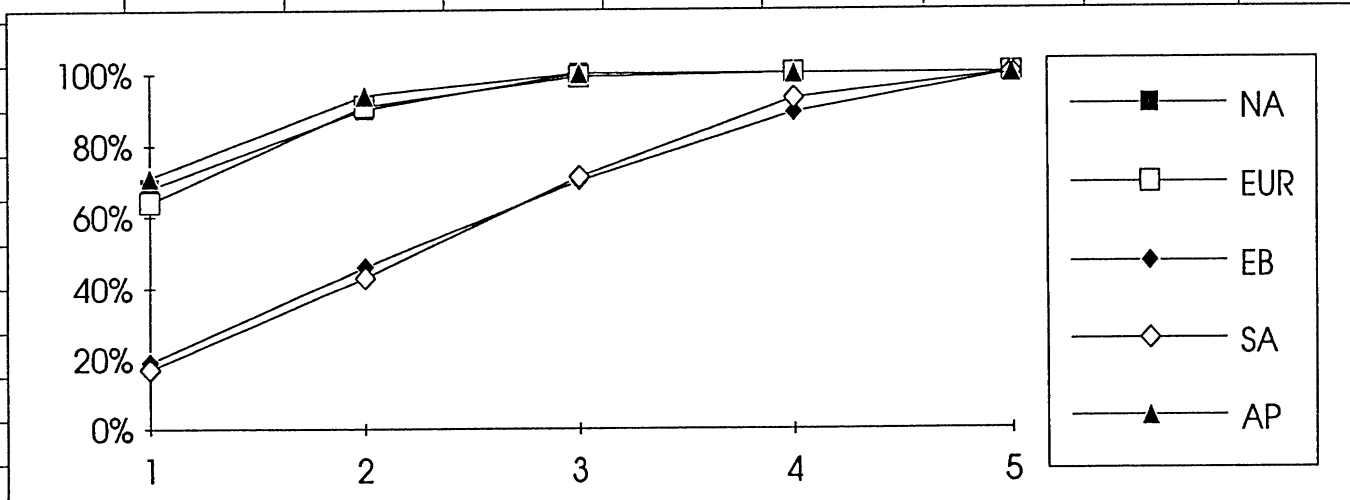
WHAT LARGE COMPANIES VALUE

		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	68%	22%	10%	0%	0%	0%
	EUR	64%	27%	8%	1%	0%	0%
Timeliness	EB	19%	27%	24%	19%	11%	0%
	SA	17%	26%	28%	22%	7%	0%
	AP	71%	23%	6%	0%	0%	0%

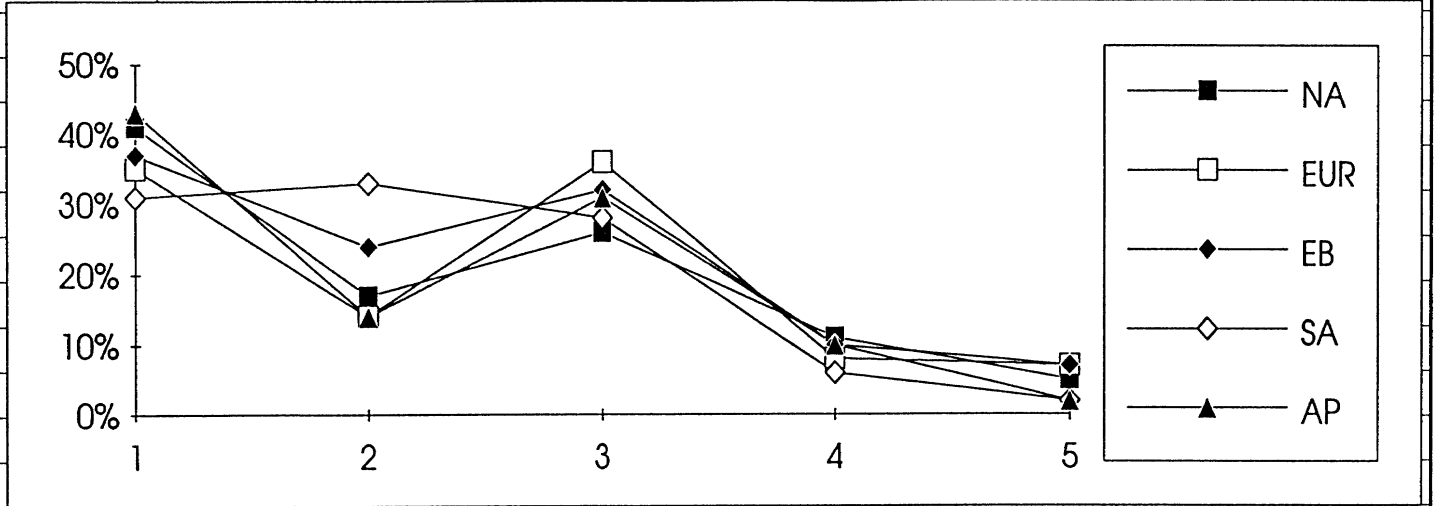


WHAT LARGE COMPANIES VALUE

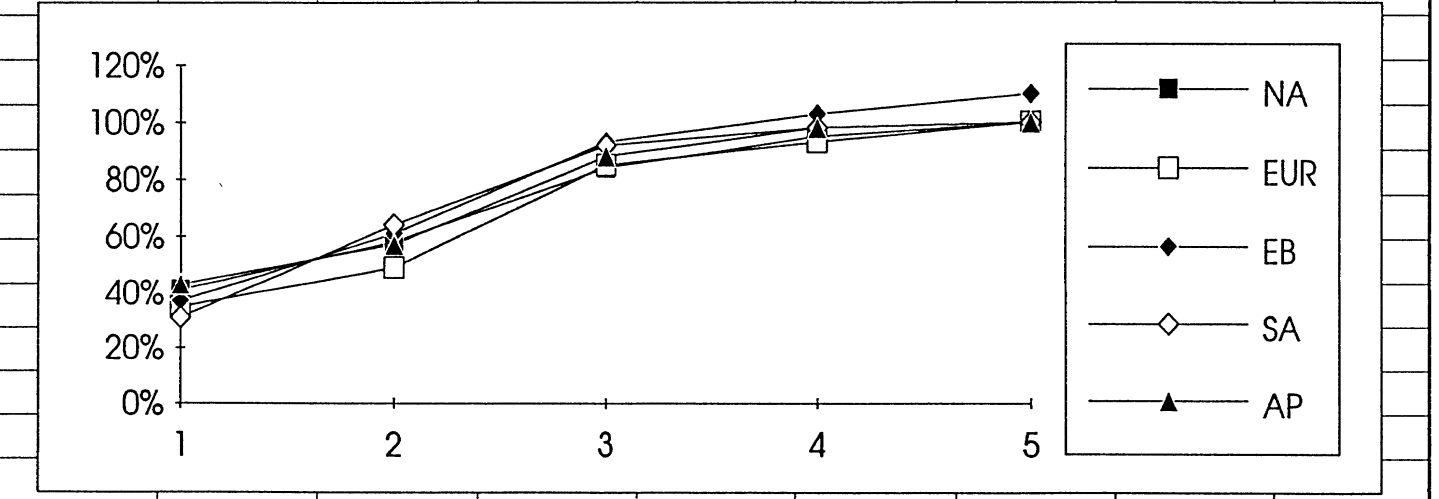
		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
SERVICE TYPE	NA	68%	90%	100%	100%	100%	100%
	EUR	64%	91%	99%	100%	100%	100%
Timeliness	EB	19%	46%	70%	89%	100%	100%
	SA	17%	43%	71%	93%	100%	100%
	AP	71%	94%	100%	100%	100%	100%



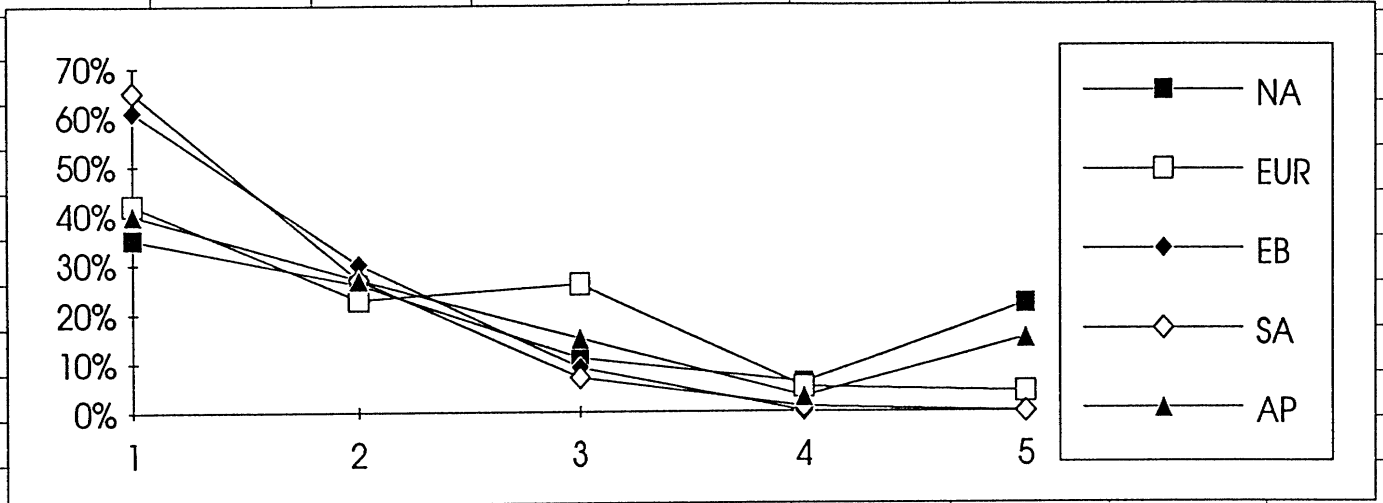
WHAT LARGE COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE	NA	41%	17%	26%	11%	5%	0%
	EUR	35%	14%	36%	8%	7%	0%
TYPE	EB	37%	24%	32%	10%	7%	0%
Variety	SA	31%	33%	28%	6%	2%	0%
	AP	43%	14%	31%	10%	2%	0%



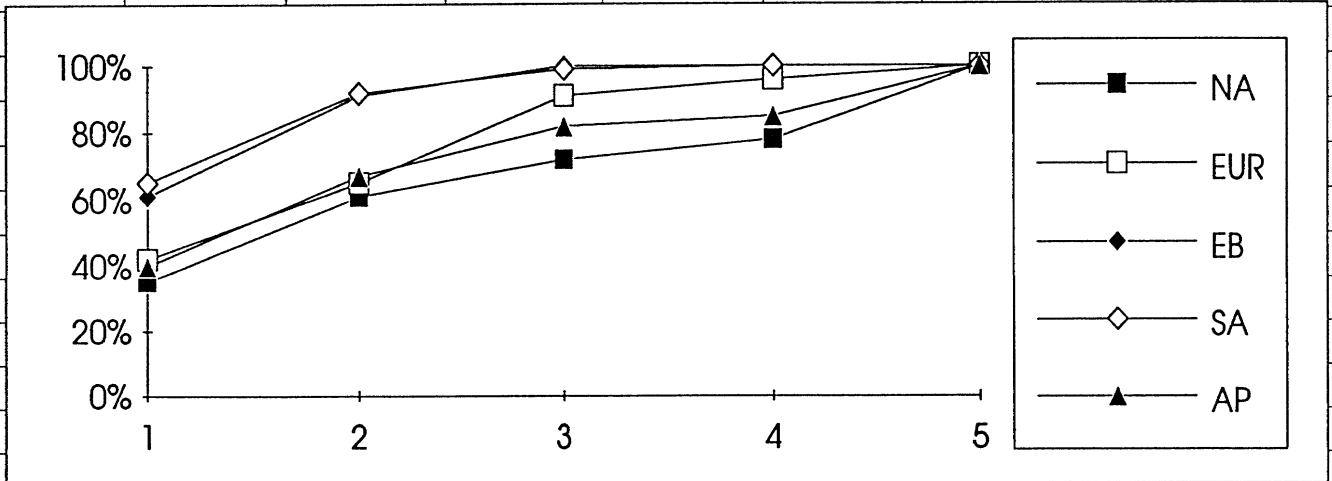
WHAT LARGE COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
SERVICE	NA	41%	58%	84%	95%	100%	100%
	EUR	35%	49%	85%	93%	100%	100%
TYPE	EB	37%	61%	93%	103%	110%	110%
Variety	SA	31%	64%	92%	98%	100%	100%
	AP	43%	57%	88%	98%	100%	100%



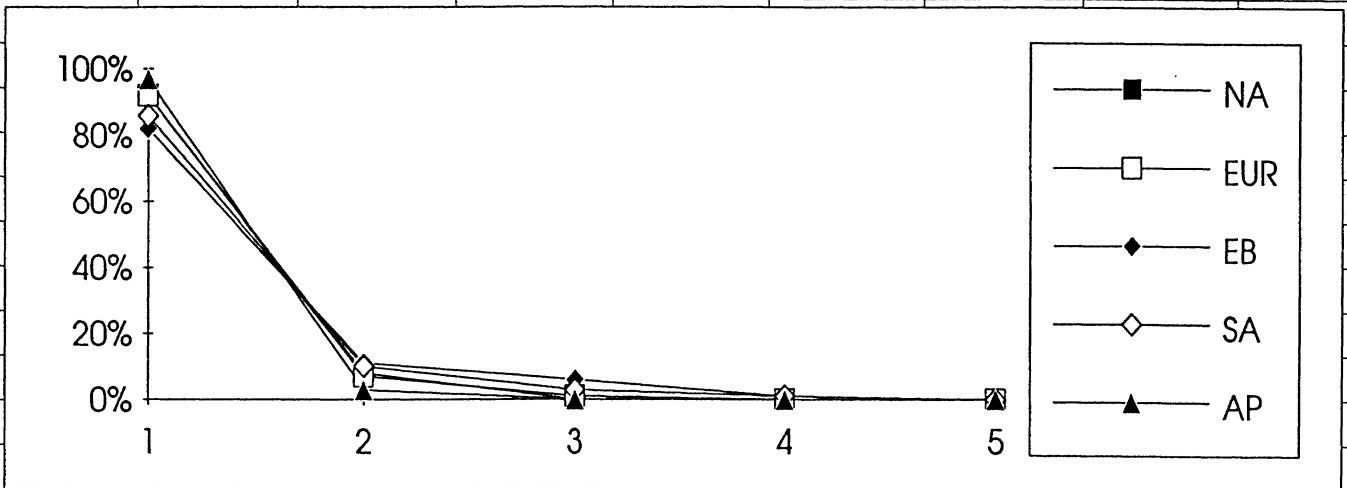
WHAT LARGE COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
	NA	35%	26%	11%	6%	22%	0%
SERVICE	EUR	42%	23%	26%	5%	4%	0%
TYPE	EB	61%	30%	9%	0%	0%	0%
Tech Asst	SA	65%	27%	7%	1%	0%	0%
	AP	40%	27%	15%	3%	15%	0%



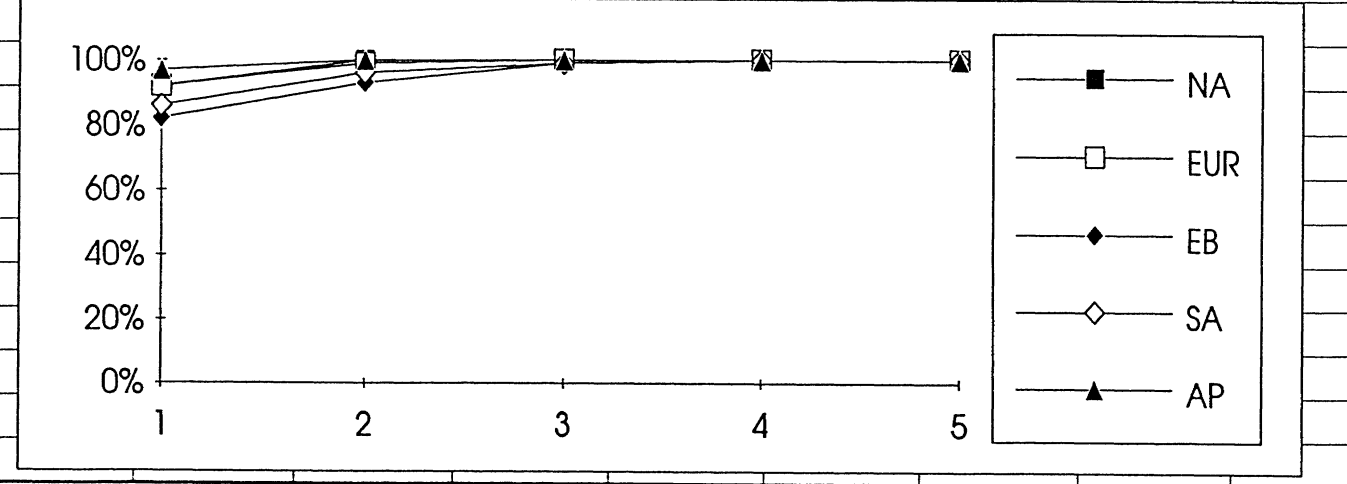
WHAT LARGE COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
	NA	35%	61%	72%	78%	100%	100%
SERVICE	EUR	42%	65%	91%	96%	100%	100%
TYPE	EB	61%	91%	100%	100%	100%	100%
Tech Asst	SA	65%	92%	99%	100%	100%	100%
	AP	40%	67%	82%	85%	100%	100%



WHAT LARGE COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
	NA	92%	8%	0%	0%	0%	0%
SERVICE	EUR	92%	7%	1%	0%	0%	0%
TYPE	EB	82%	11%	6%	1%	0%	0%
Quality	SA	86%	10%	3%	1%	0%	0%
	AP	97%	3%	0%	0%	0%	0%

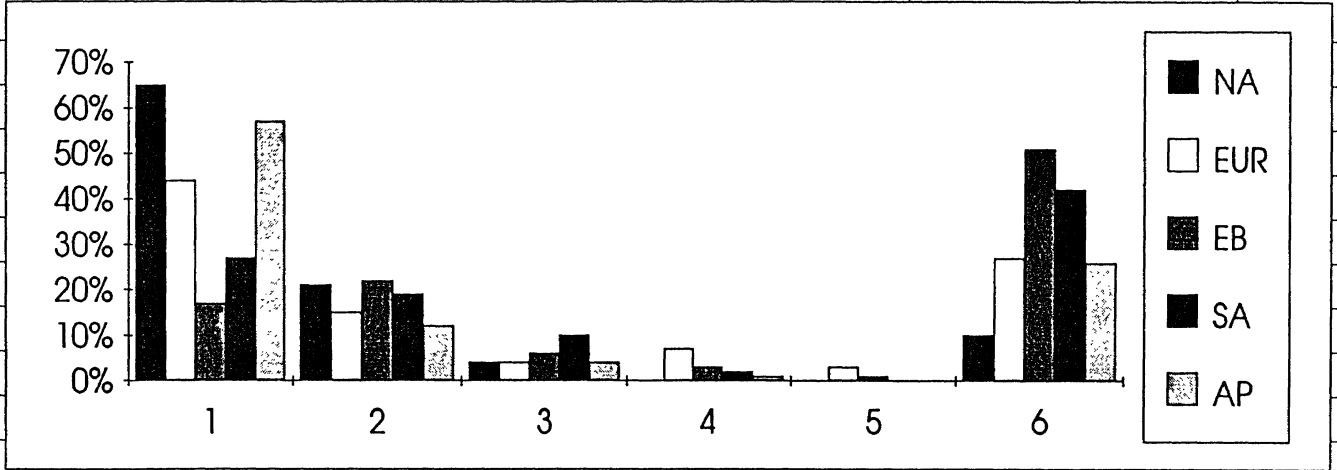


WHAT LARGE COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
	NA	92%	100%	100%	100%	100%	100%
SERVICE	EUR	92%	99%	100%	100%	100%	100%
TYPE	EB	82%	93%	99%	100%	100%	100%
Quality	SA	86%	96%	99%	100%	100%	100%
	AP	97%	100%	100%	100%	100%	100%



HOW LARGE COMPANIES PERCEIVE OUR SERVICE

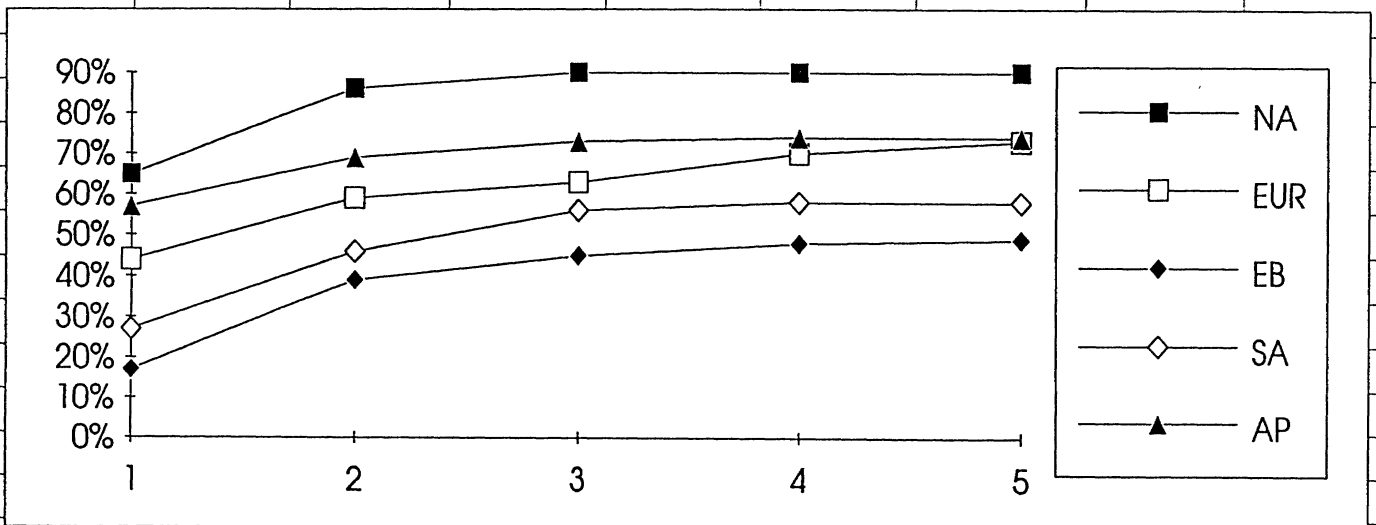
		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE	NA	65%	21%	4%	0%	0%	10%
	EUR	44%	15%	4%	7%	3%	27%
TYPE	EB	17%	22%	6%	3%	1%	51%
Price	SA	27%	19%	10%	2%	0%	42%
	AP	57%	12%	4%	1%	0%	26%



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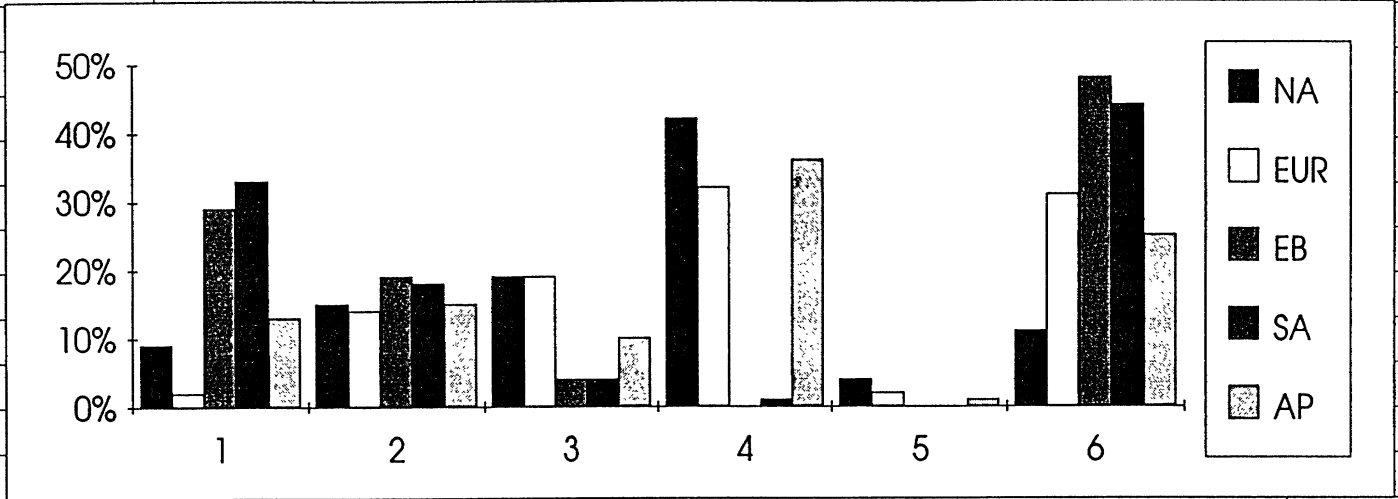
HOW LARGE COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE	NA	65%	86%	90%	90%	90%	100%
	EUR	44%	59%	63%	70%	73%	100%
TYPE	EB	17%	39%	45%	48%	49%	100%
Price	SA	27%	46%	56%	58%	58%	100%
	AP	57%	69%	73%	74%	74%	100%



HOW LARGE COMPANIES PERCEIVE OUR SERVICE

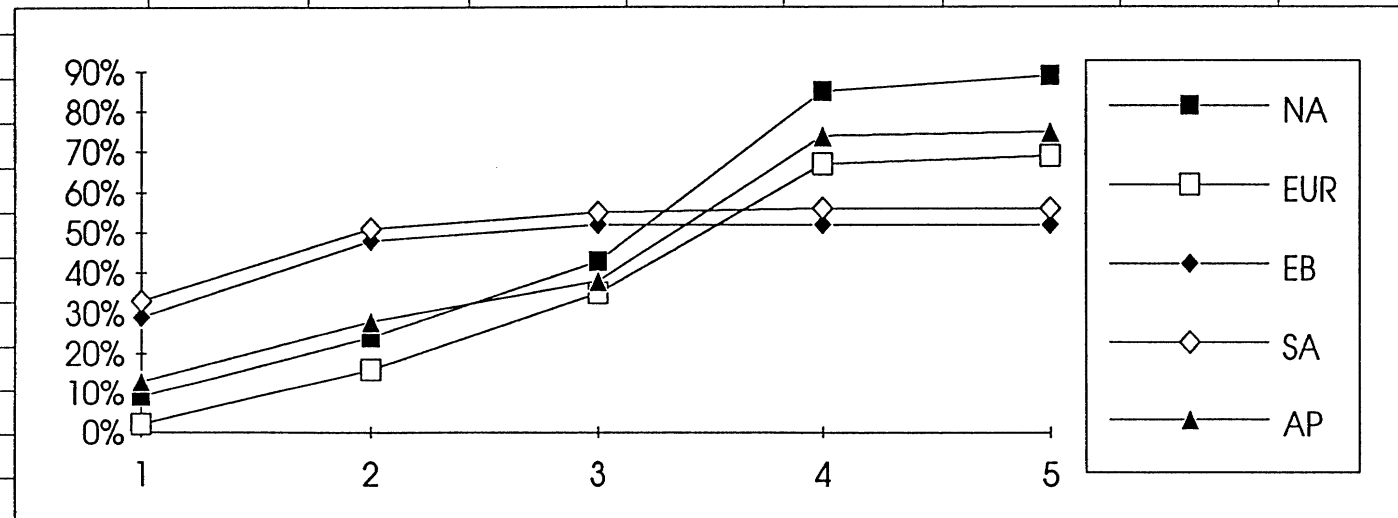
		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	9%	15%	19%	42%	4%	11%
SERVICE	EUR	2%	14%	19%	32%	2%	31%
TYPE	EB	29%	19%	4%	0%	0%	48%
Timeliness	SA	33%	18%	4%	1%	0%	44%
	AP	13%	15%	10%	36%	1%	25%



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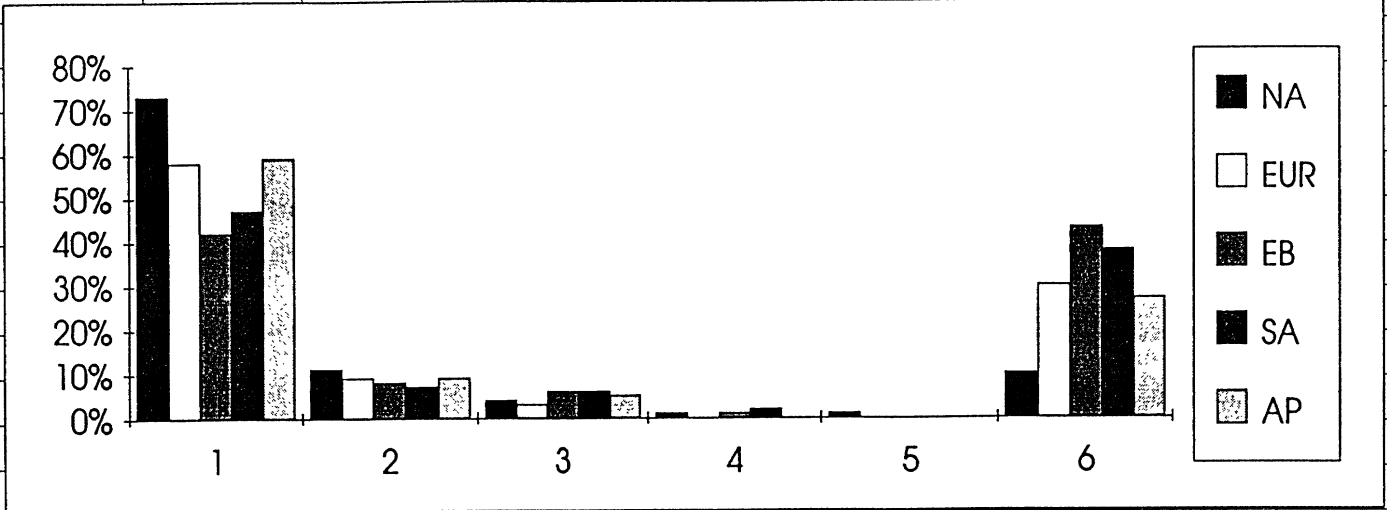
HOW LARGE COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	9%	24%	43%	85%	89%	100%
SERVICE	EUR	2%	16%	35%	67%	69%	100%
TYPE	EB	29%	48%	52%	52%	52%	100%
Timeliness	SA	33%	51%	55%	56%	56%	100%
	AP	13%	28%	38%	74%	75%	100%



HOW LARGE COMPANIES PERCEIVE OUR SERVICE

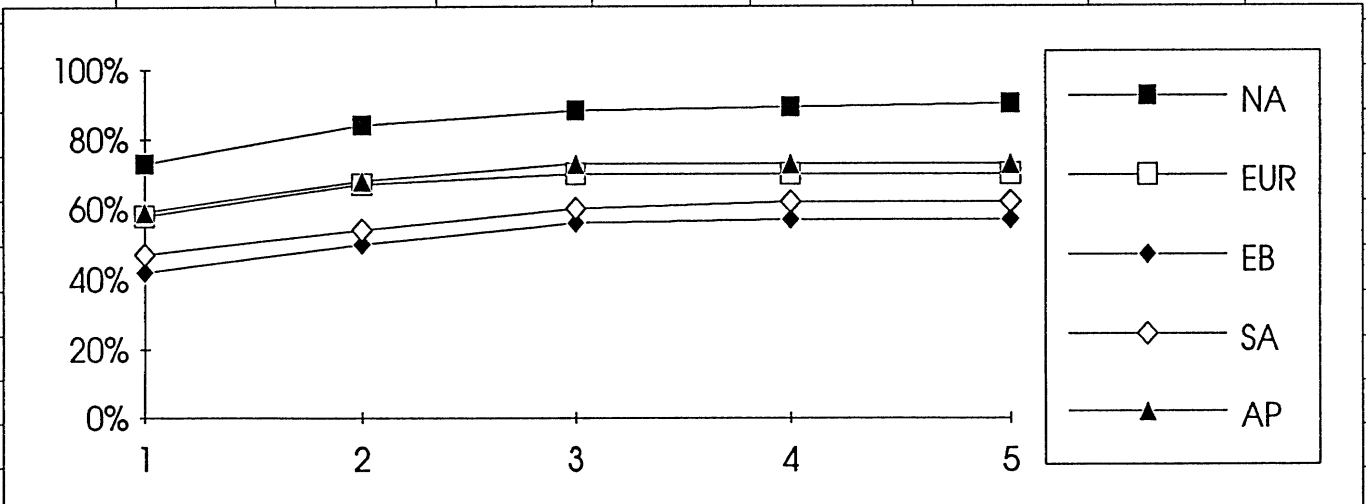
		RATING						
		Exceptional	Neutral			Unacceptable		Don't Know
		1	2	3	4	5	6	
	NA	73%	11%	4%	1%	1%	10%	
SERVICE	EUR	58%	9%	3%	0%	0%	30%	
TYPE	EB	42%	8%	6%	1%	0%	43%	
Variety	SA	47%	7%	6%	2%	0%	38%	
	AP	59%	9%	5%	0%	0%	27%	



0

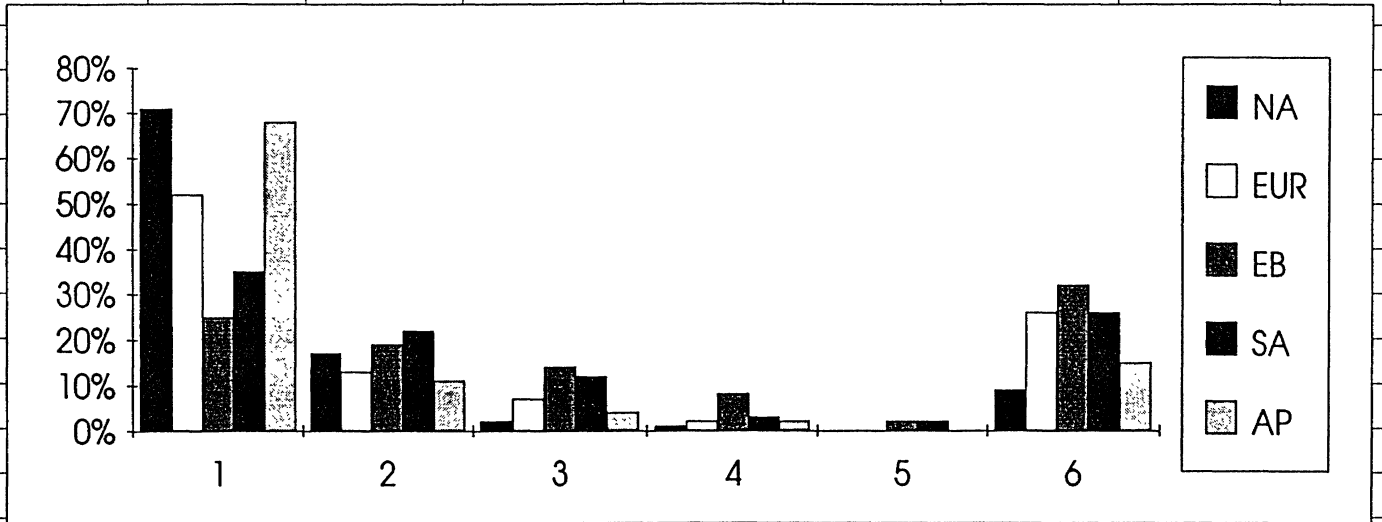
HOW LARGE COMPANIES PERCEIVE OUR SERVICE

		RATING						
		Exceptional	Neutral			Unacceptable		Don't Know
		1	2	3	4	5	6	
	NA	73%	84%	88%	89%	90%	100%	
SERVICE	EUR	58%	67%	70%	70%	70%	100%	
TYPE	EB	42%	50%	56%	57%	57%	100%	
Variety	SA	47%	54%	60%	62%	62%	100%	
	AP	59%	68%	73%	73%	73%	100%	



HOW LARGE COMPANIES PERCEIVE OUR SERVICE

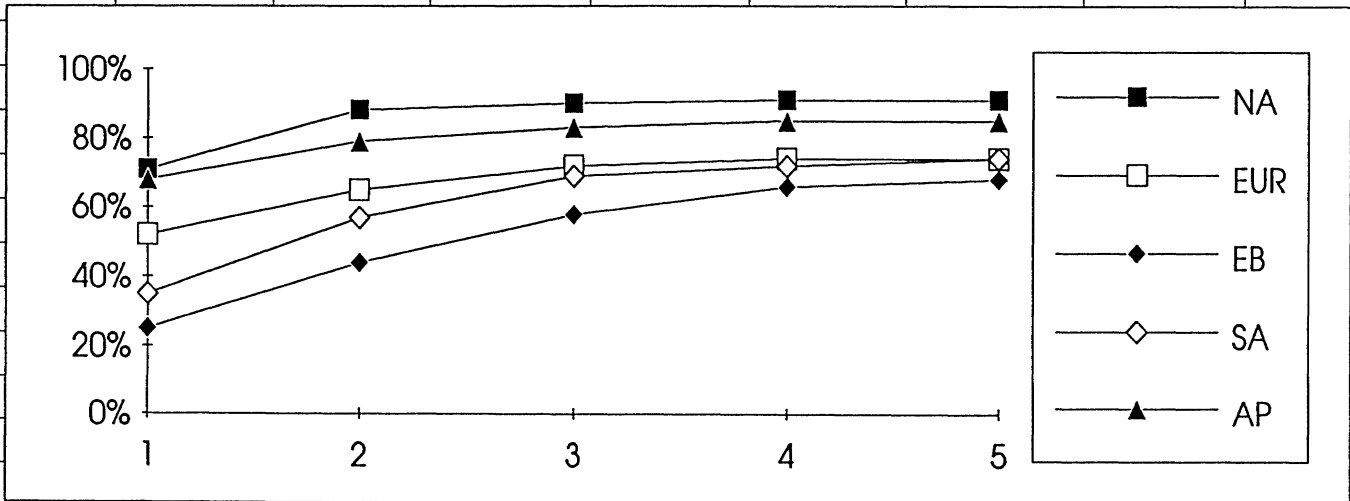
		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	71%	17%	2%	1%	0%	9%
SERVICE	EUR	52%	13%	7%	2%	0%	26%
TYPE	EB	25%	19%	14%	8%	2%	32%
Tech Asst	SA	35%	22%	12%	3%	2%	26%
	AP	68%	11%	4%	2%	0%	15%



0

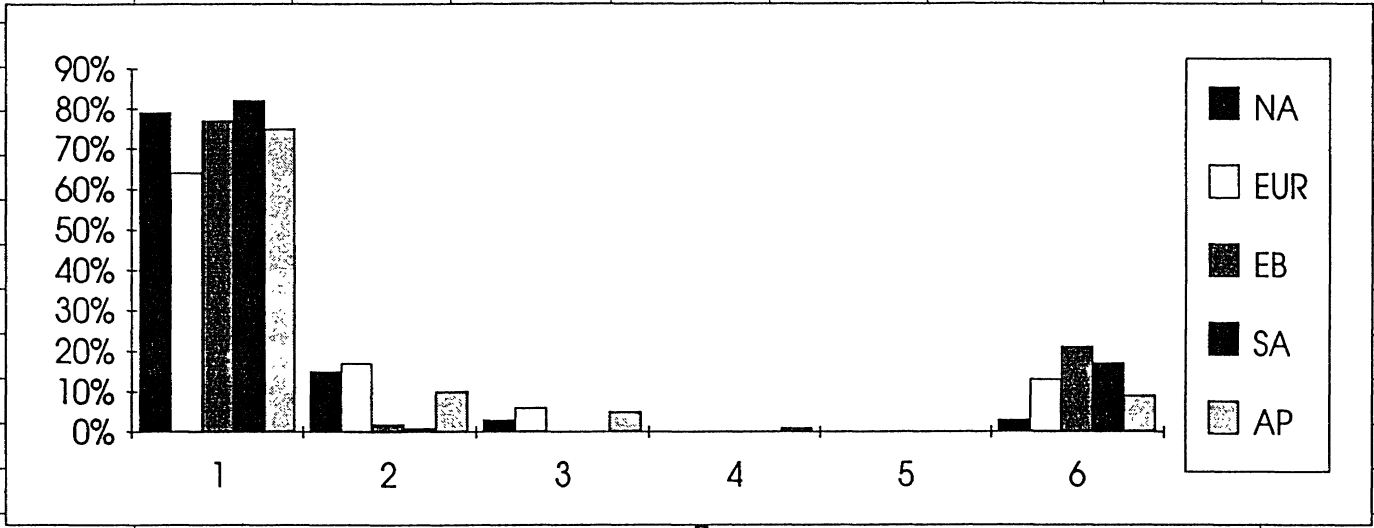
HOW LARGE COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	71%	88%	90%	91%	91%	100%
SERVICE	EUR	52%	65%	72%	74%	74%	100%
TYPE	EB	25%	44%	58%	66%	68%	100%
Tech Asst	SA	35%	57%	69%	72%	74%	100%
	AP	68%	79%	83%	85%	85%	100%



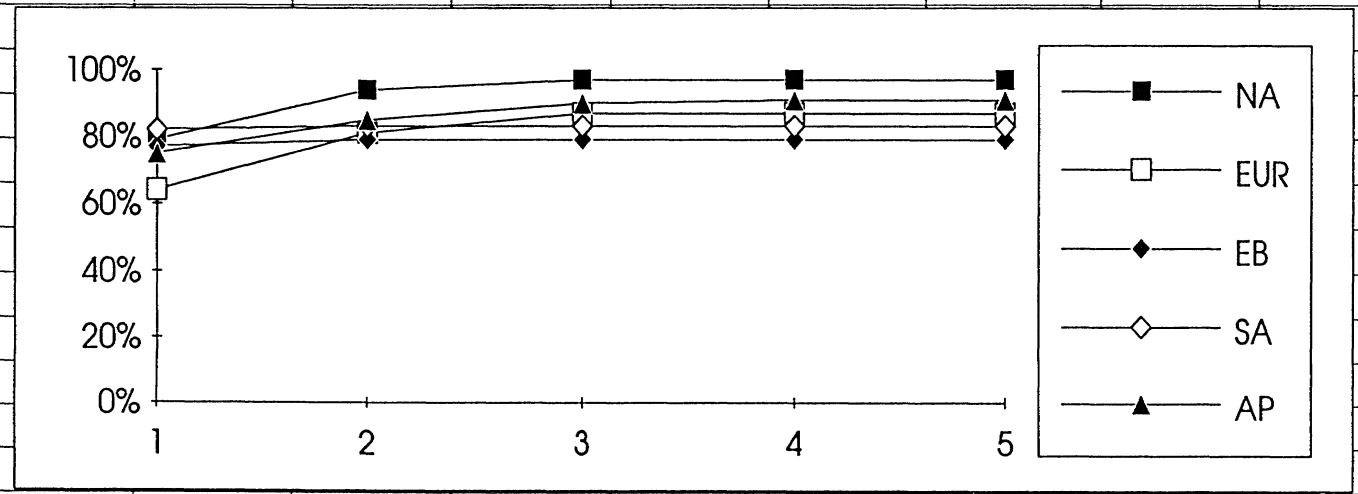
HOW LARGE COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	79%	15%	3%	0%	0%	3%
	EUR	64%	17%	6%	0%	0%	13%
	EB	77%	2%	0%	0%	0%	21%
	SA	82%	1%	0%	0%	0%	17%
	AP	75%	10%	5%	1%	0%	9%



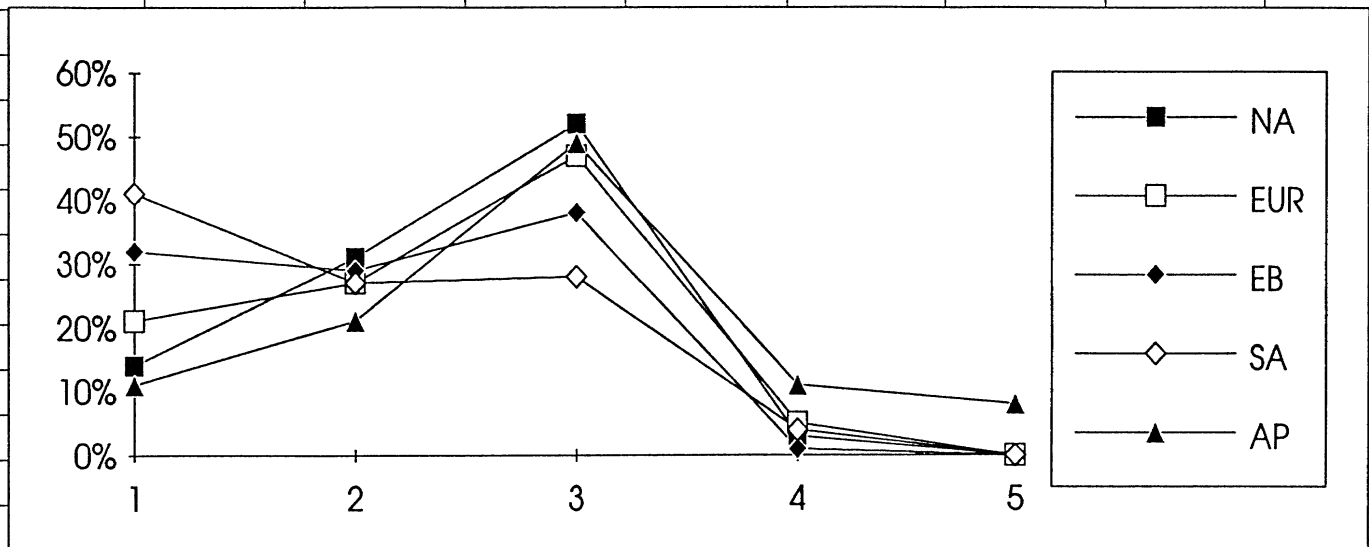
HOW LARGE COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	79%	94%	97%	97%	97%	100%
	EUR	64%	81%	87%	87%	87%	100%
	EB	77%	79%	79%	79%	79%	100%
	SA	82%	83%	83%	83%	83%	100%
	AP	75%	85%	90%	91%	91%	100%



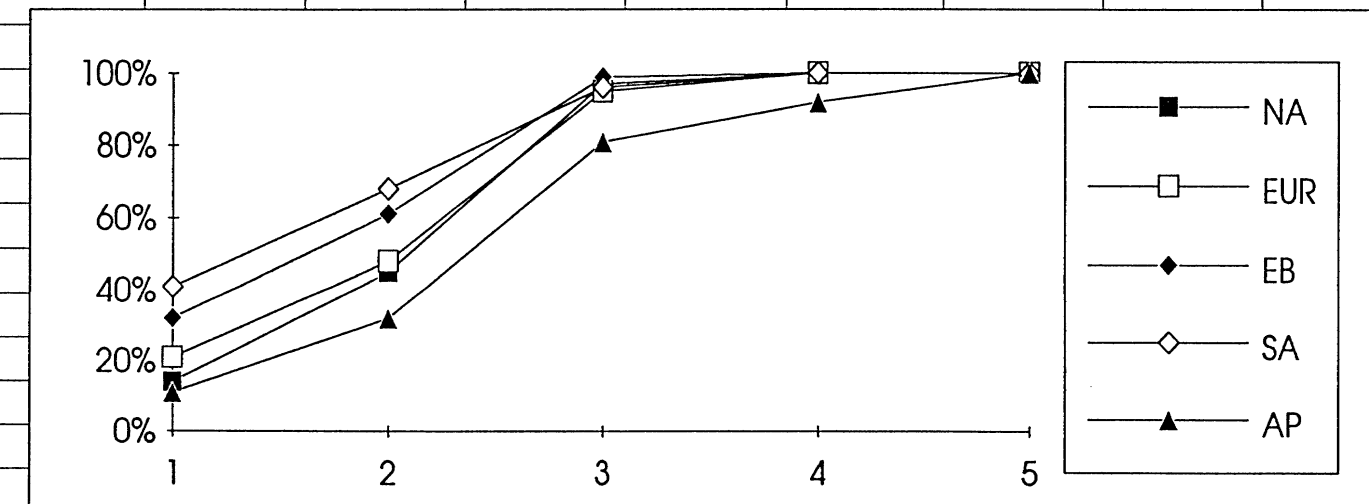
WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	14%	31%	52%	3%	0%	0%
	EUR	21%	27%	47%	5%	0%	0%
	EB	32%	29%	38%	1%	0%	0%
	SA	41%	27%	28%	4%	0%	0%
	AP	11%	21%	49%	11%	8%	0%



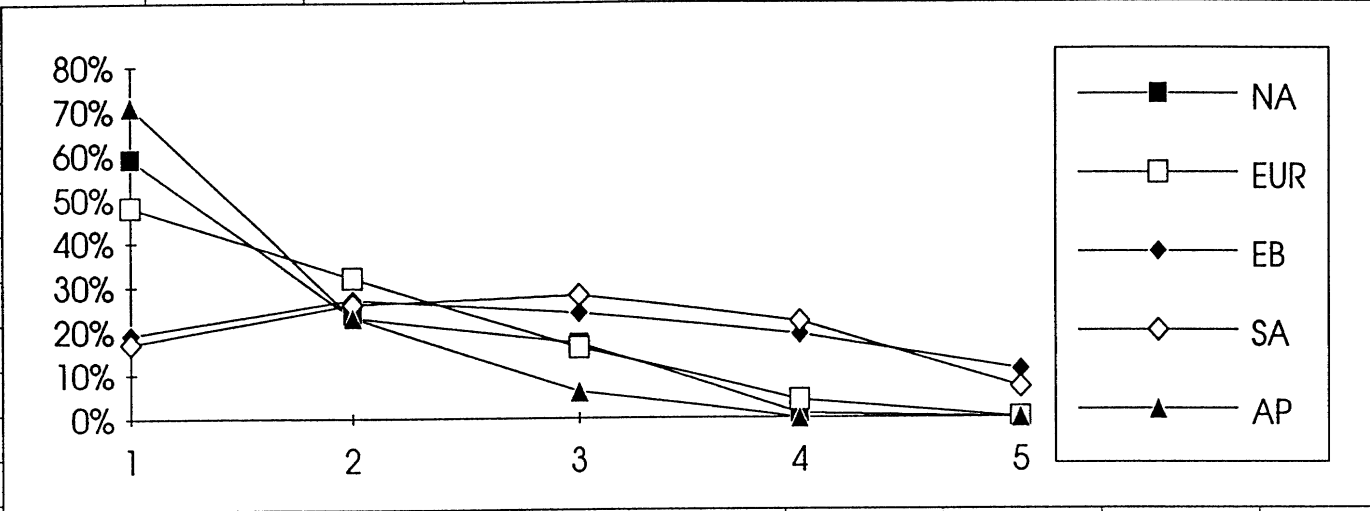
WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
SERVICE TYPE	NA	14%	45%	97%	100%	100%	100%
	EUR	21%	48%	95%	100%	100%	100%
	EB	32%	61%	99%	100%	100%	100%
	SA	41%	68%	96%	100%	100%	100%
	AP	11%	32%	81%	92%	100%	100%



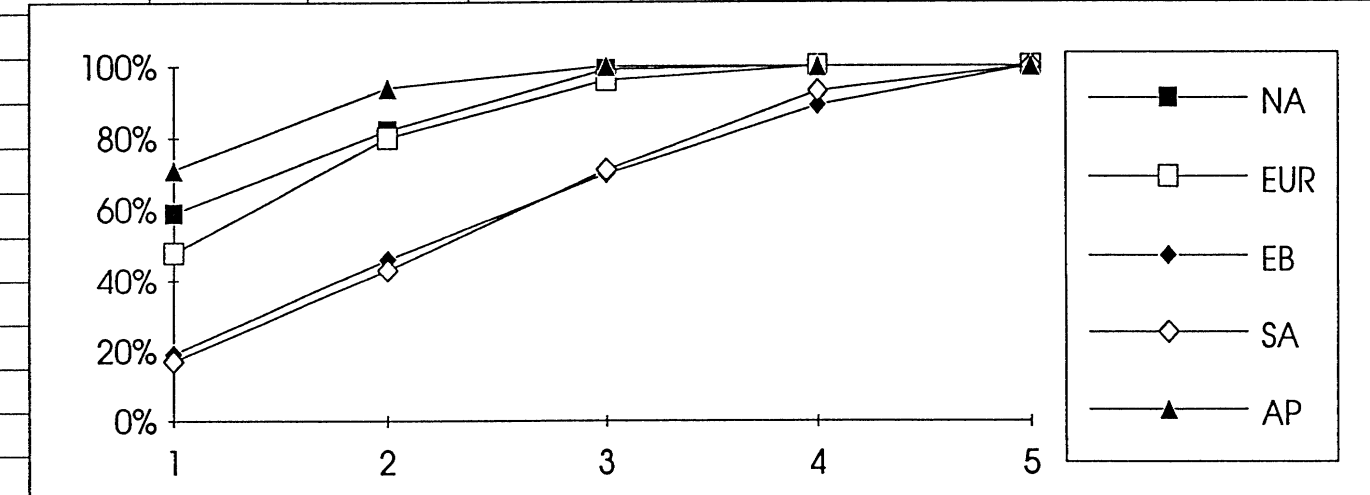
WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	59%	23%	17%	1%	0%	0%
	EUR	48%	32%	16%	4%	0%	0%
	EB	19%	27%	24%	19%	11%	0%
	SA	17%	26%	28%	22%	7%	0%
	AP	71%	23%	6%	0%	0%	0%

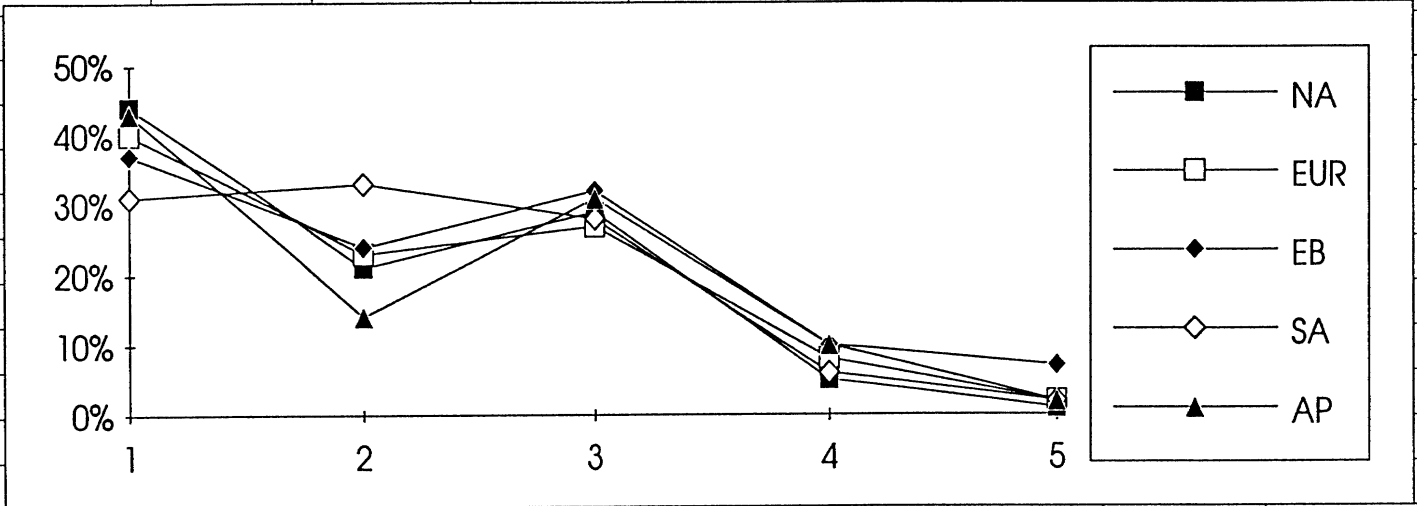


WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

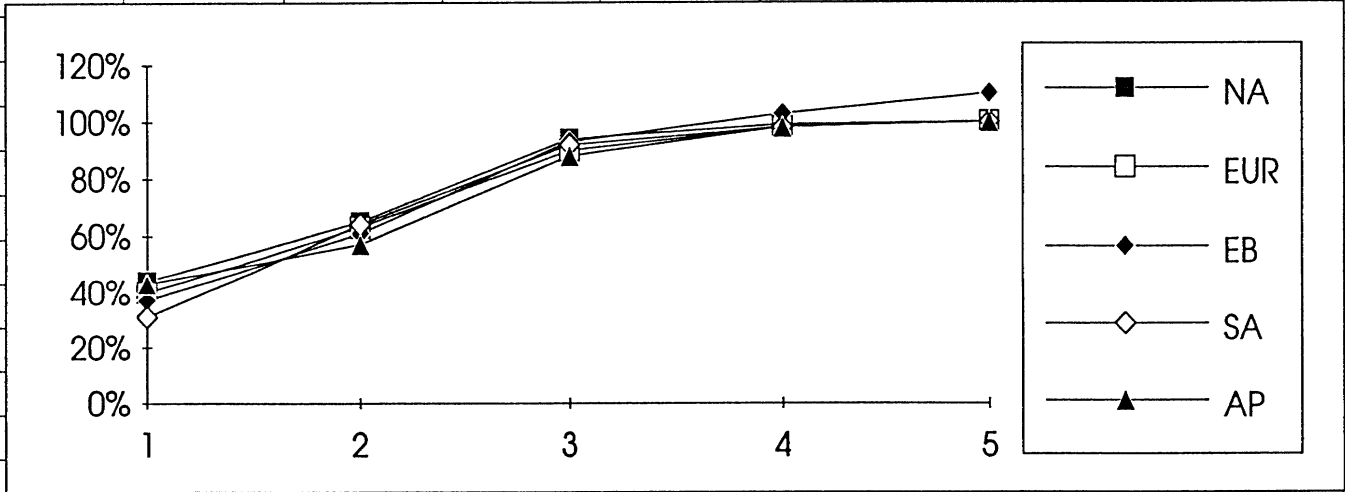
		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
SERVICE TYPE	NA	59%	82%	99%	100%	100%	100%
	EUR	48%	80%	96%	100%	100%	100%
	EB	19%	46%	70%	89%	100%	100%
	SA	17%	43%	71%	93%	100%	100%
	AP	71%	94%	100%	100%	100%	100%



WHAT MEDIUM and SMALL SIZED COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE Variety	NA	44%	21%	29%	5%	1%	0%
	EUR	40%	23%	27%	8%	2%	0%
	EB	37%	24%	32%	10%	7%	0%
	SA	31%	33%	28%	6%	2%	0%
	AP	43%	14%	31%	10%	2%	0%

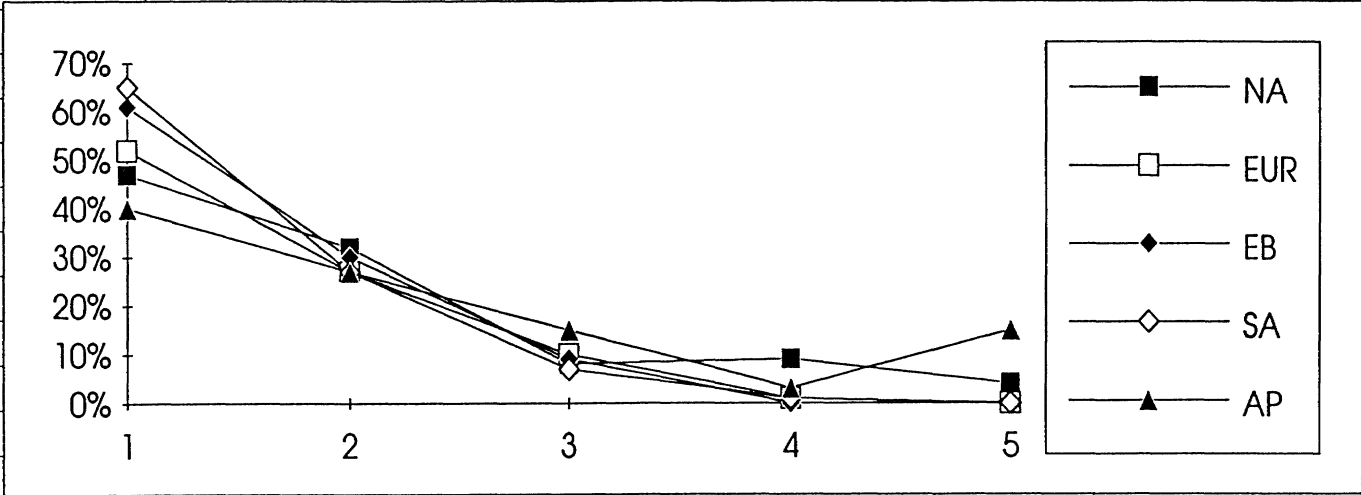


WHAT MEDIUM and SMALL SIZED COMPANIES VALUE							
		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
SERVICE TYPE Variety	NA	44%	65%	94%	99%	100%	100%
	EUR	40%	63%	90%	98%	100%	100%
	EB	37%	61%	93%	103%	110%	110%
	SA	31%	64%	92%	98%	100%	100%
	AP	43%	57%	88%	98%	100%	100%



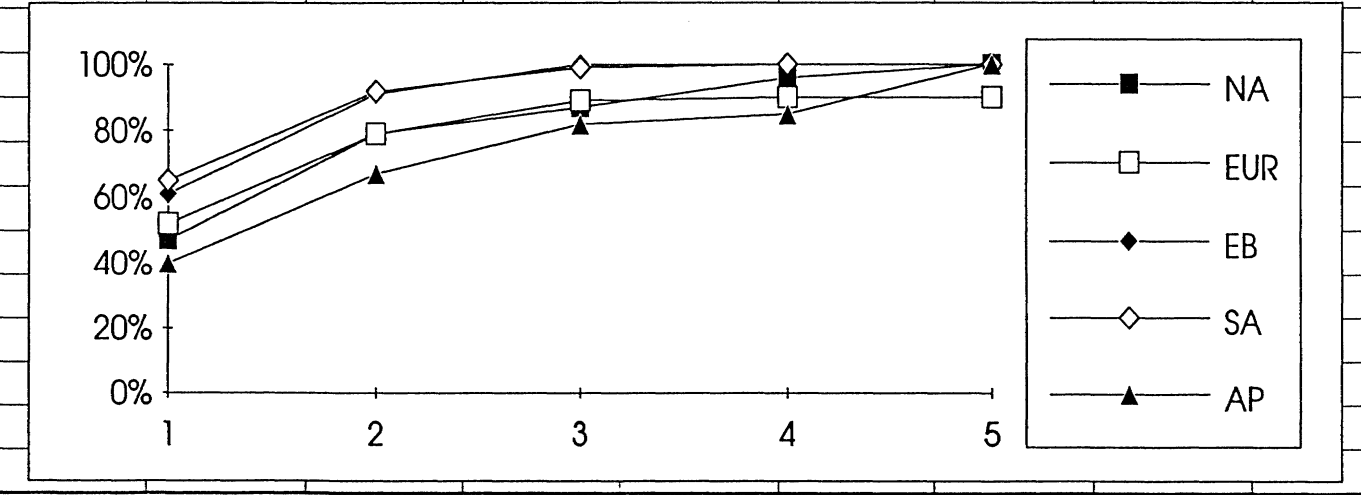
WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE	NA	47%	32%	8%	9%	4%	0%
	EUR	52%	27%	10%	1%	0%	0%
TYPE	EB	61%	30%	9%	0%	0%	0%
	SA	65%	27%	7%	1%	0%	0%
Tech Asst	AP	40%	27%	15%	3%	15%	0%



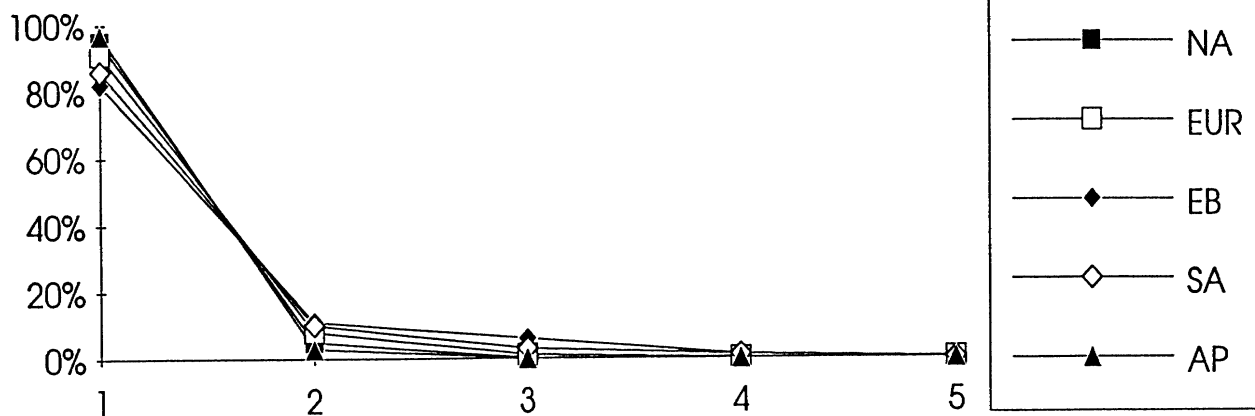
WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
NA	47%	79%	87%	96%	100%	100%	
EUR	52%	79%	89%	90%	90%	90%	
EB	61%	91%	100%	100%	100%	100%	
SA	65%	92%	99%	100%	100%	100%	
AP	40%	67%	82%	85%	100%	100%	



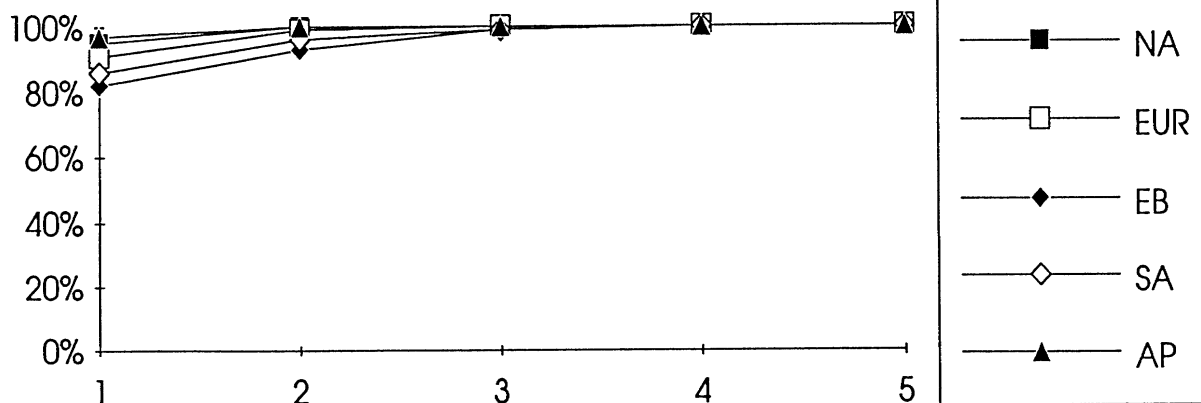
WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

		RATING					
		Critical	Important			Irrelevant	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	95%	5%	0%	0%	0%	0%
	EUR	91%	8%	1%	0%	0%	0%
	EB	82%	11%	6%	1%	0%	0%
	SA	86%	10%	3%	1%	0%	0%
	AP	97%	3%	0%	0%	0%	0%



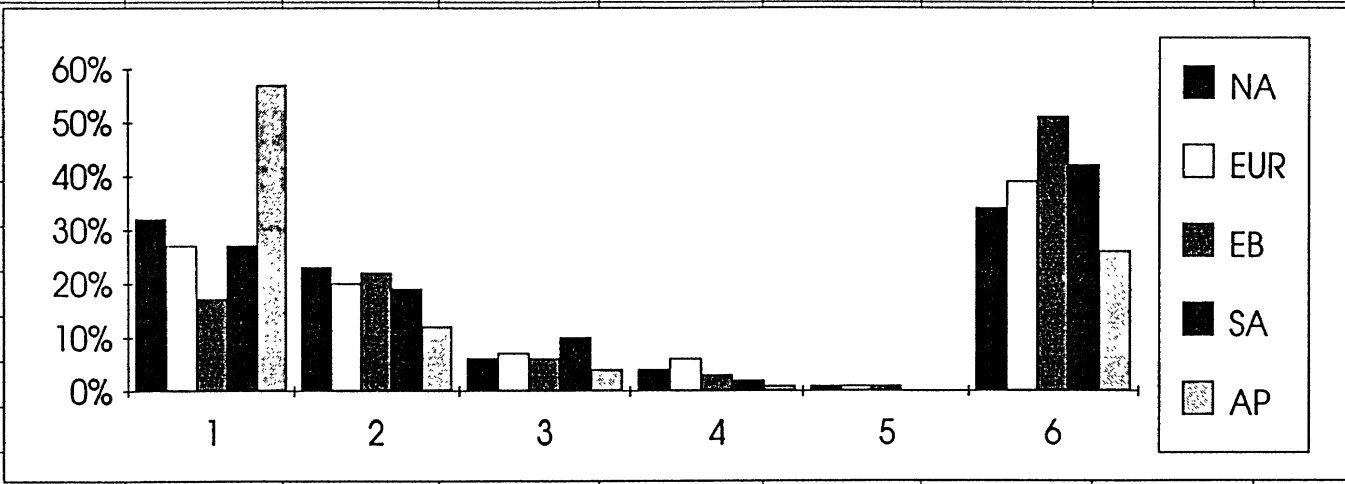
WHAT MEDIUM and SMALL SIZED COMPANIES VALUE

		RATING					
		Critical	Important			Irrelevant	Don't Know
		0	0	0	0	0	0
SERVICE TYPE	NA	95%	100%	100%	100%	100%	100%
	EUR	91%	99%	100%	100%	100%	100%
	EB	82%	93%	99%	100%	100%	100%
	SA	86%	96%	99%	100%	100%	100%
	AP	97%	100%	100%	100%	100%	100%



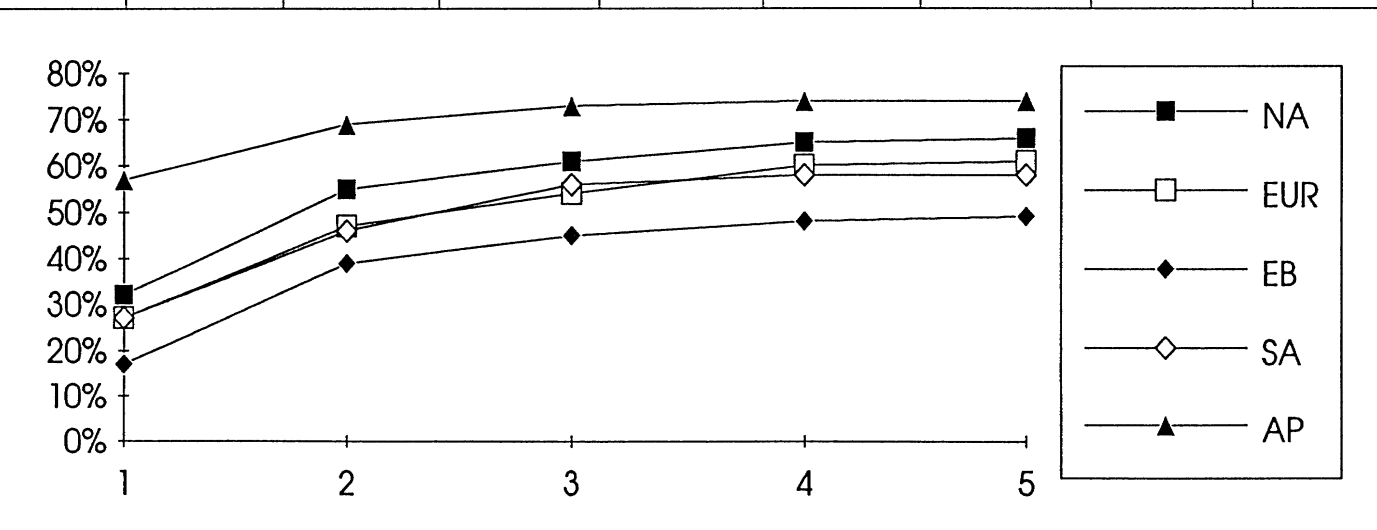
HOW MEDIUM and SMALL SIZED COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	32%	23%	6%	4%	1%	34%
SERVICE	EUR	27%	20%	7%	6%	1%	39%
TYPE	EB	17%	22%	6%	3%	1%	51%
Price	SA	27%	19%	10%	2%	0%	42%
	AP	57%	12%	4%	1%	0%	26%



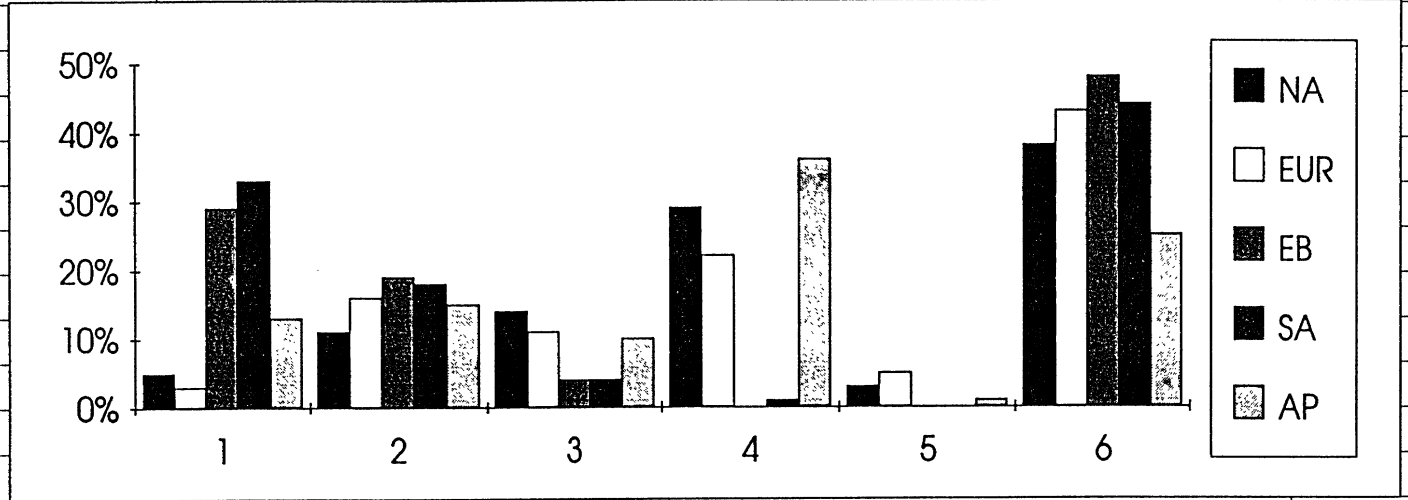
HOW MEDIUM and SMALL SIZED COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	32%	55%	61%	65%	66%	100%
SERVICE	EUR	27%	47%	54%	60%	61%	100%
TYPE	EB	17%	39%	45%	48%	49%	100%
Price	SA	27%	46%	56%	58%	58%	100%
	AP	57%	69%	73%	74%	74%	100%



HOW MEDIUM and SMALL SIZED COMPANIES PERCEIVE OUR SERVICE

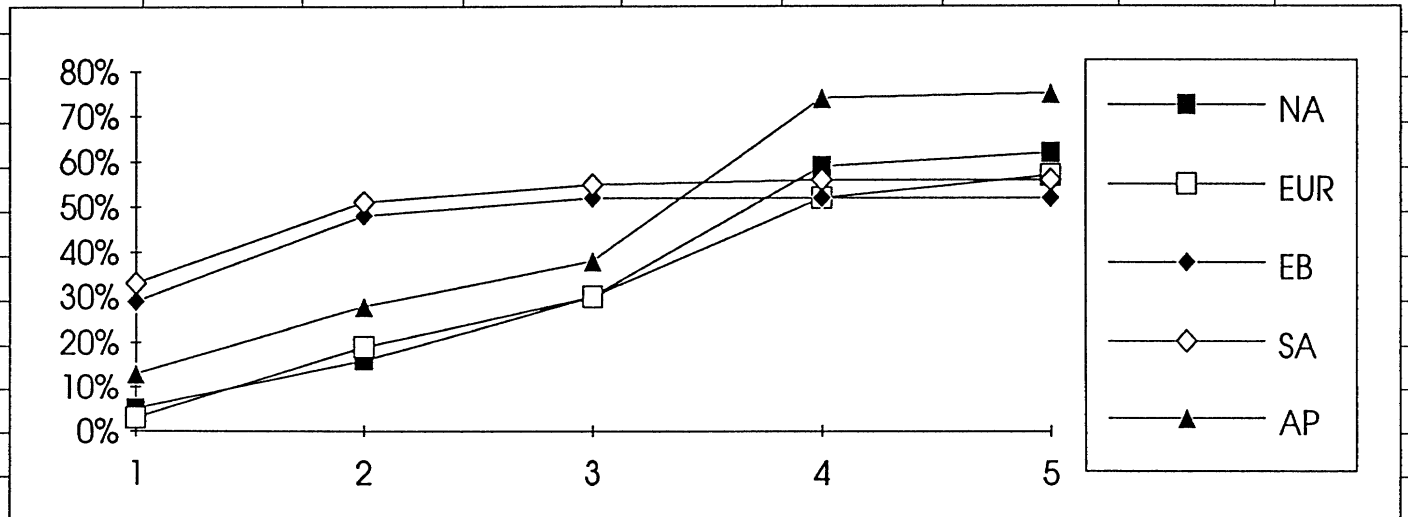
		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	5%	11%	14%	29%	3%	38%
SERVICE	EUR	3%	16%	11%	22%	5%	43%
TYPE	EB	29%	19%	4%	0%	0%	48%
Timeliness	SA	33%	18%	4%	1%	0%	44%
	AP	13%	15%	10%	36%	1%	25%



0

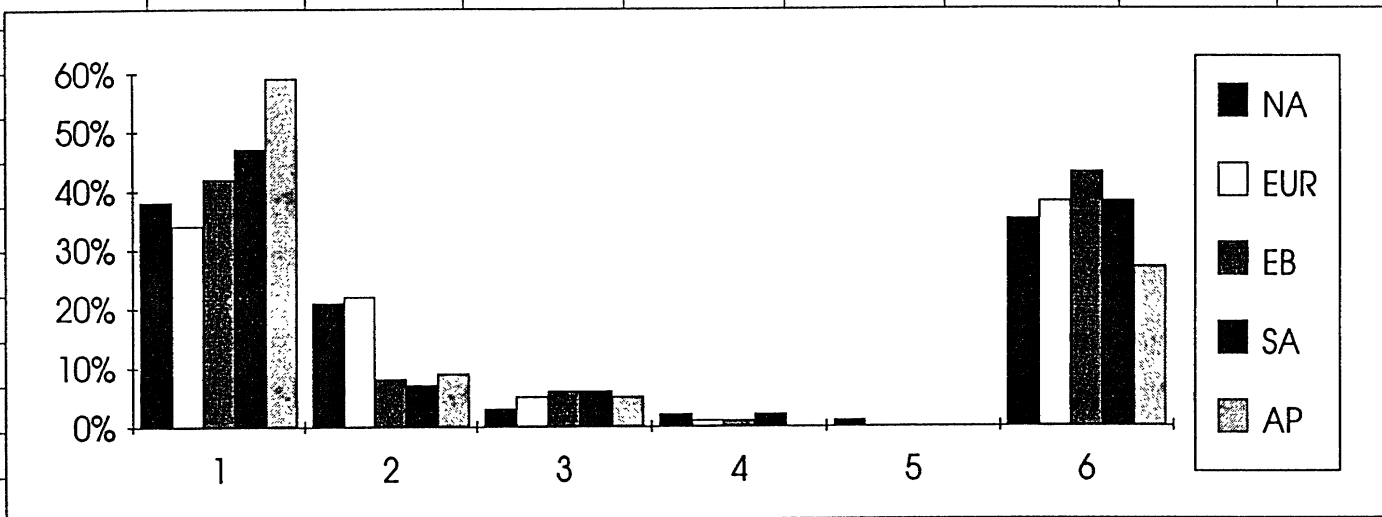
HOW MEDIUM and SMALL SIZED COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	5%	16%	30%	59%	62%	100%
SERVICE	EUR	3%	19%	30%	52%	57%	100%
TYPE	EB	29%	48%	52%	52%	52%	100%
Timeliness	SA	33%	51%	55%	56%	56%	100%
	AP	13%	28%	38%	74%	75%	100%



HOW COMPANIES PERCEIVE OUR SERVICE

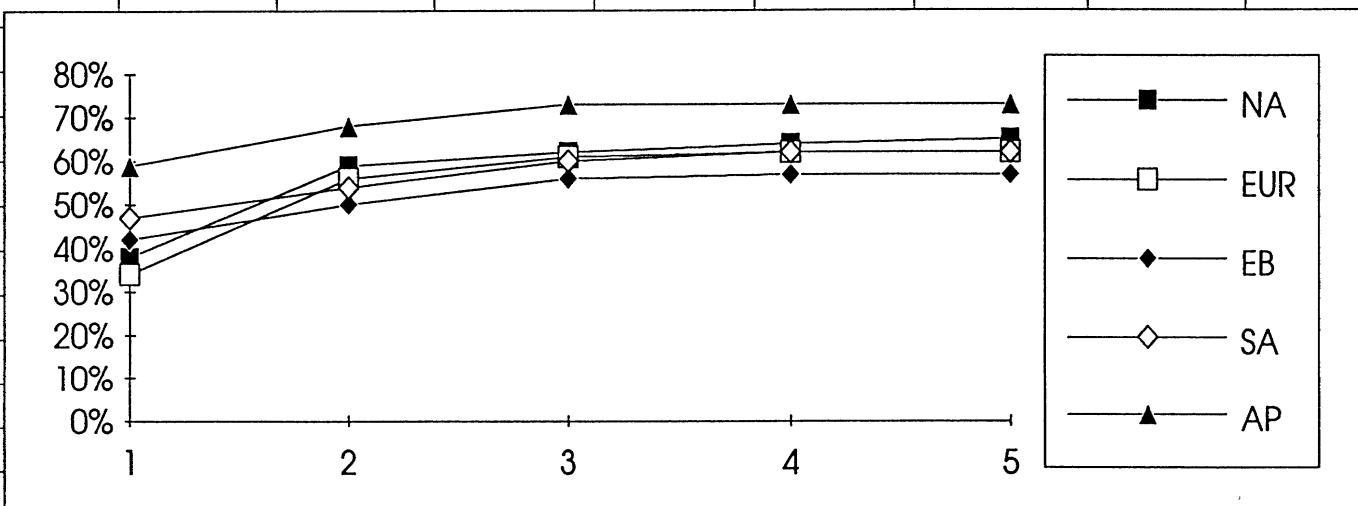
		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	38%	21%	3%	2%	1%	35%
	EUR	34%	22%	5%	1%	0%	38%
	EB	42%	8%	6%	1%	0%	43%
	Variety SA	47%	7%	6%	2%	0%	38%
	AP	59%	9%	5%	0%	0%	27%



0

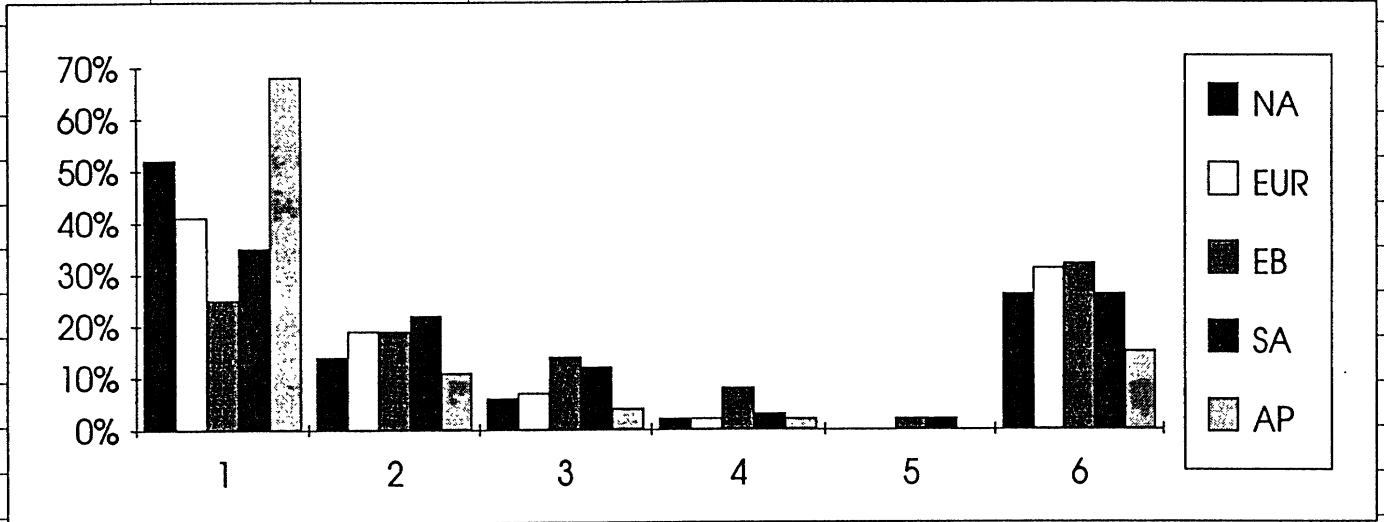
HOW COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	38%	59%	62%	64%	65%	100%
	EUR	34%	56%	61%	62%	62%	100%
	EB	42%	50%	56%	57%	57%	100%
	Variety SA	47%	54%	60%	62%	62%	100%
	AP	59%	68%	73%	73%	73%	100%



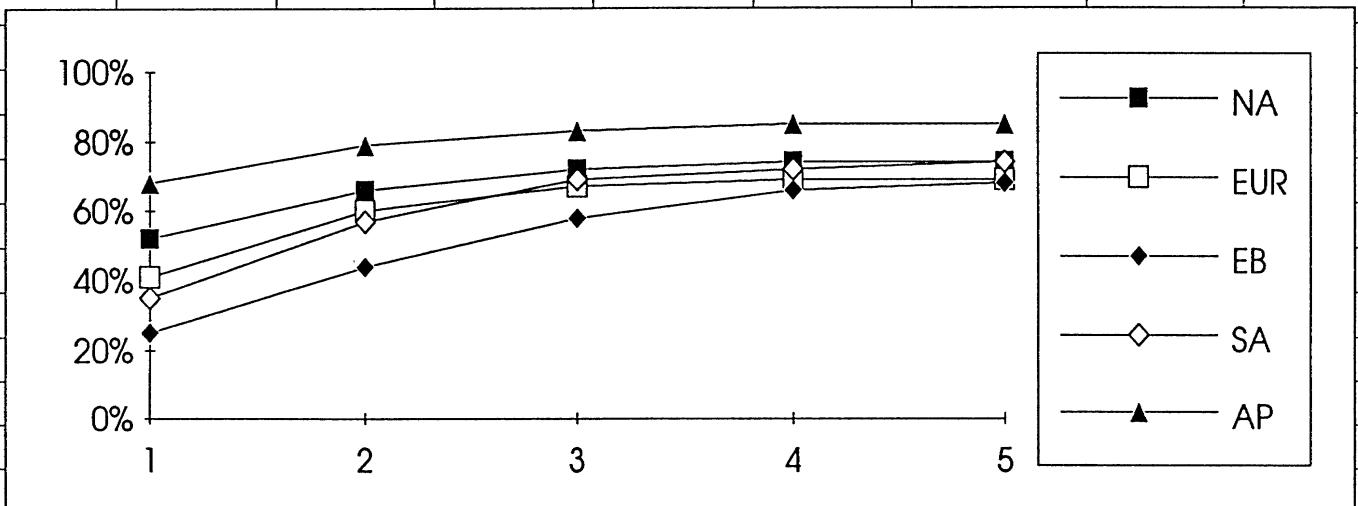
HOW COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	52%	14%	6%	2%	0%	26%
SERVICE	EUR	41%	19%	7%	2%	0%	31%
TYPE	EB	25%	19%	14%	8%	2%	32%
Tech Asst	SA	35%	22%	12%	3%	2%	26%
	AP	68%	11%	4%	2%	0%	15%



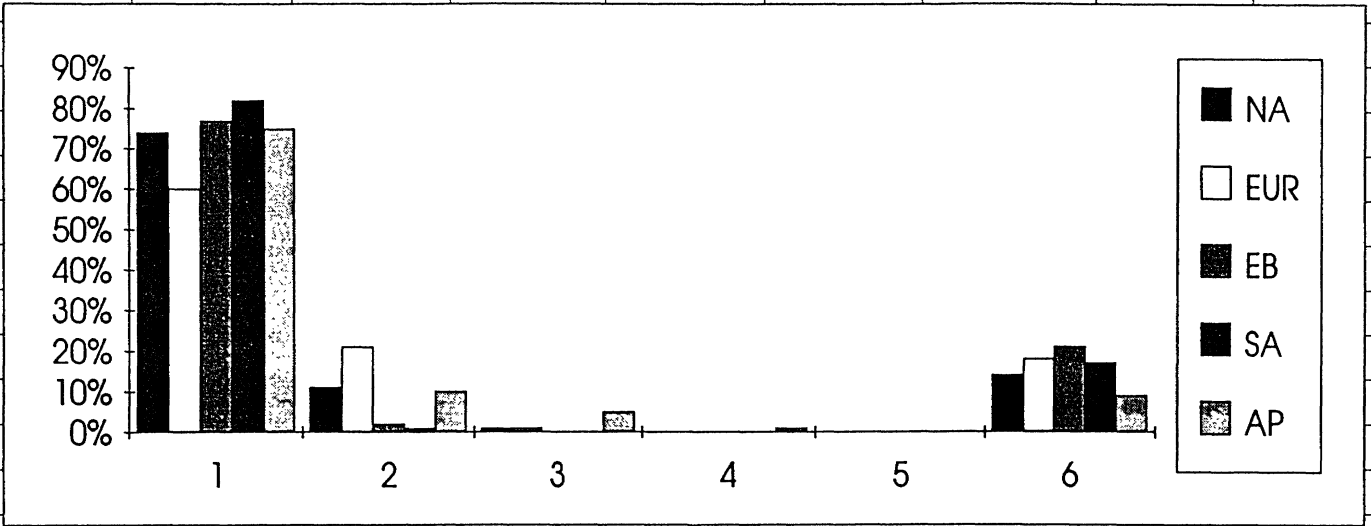
HOW COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
	NA	52%	66%	72%	74%	74%	100%
SERVICE	EUR	41%	60%	67%	69%	69%	100%
TYPE	EB	25%	44%	58%	66%	68%	100%
Tech Asst	SA	35%	57%	69%	72%	74%	100%
	AP	68%	79%	83%	85%	85%	100%



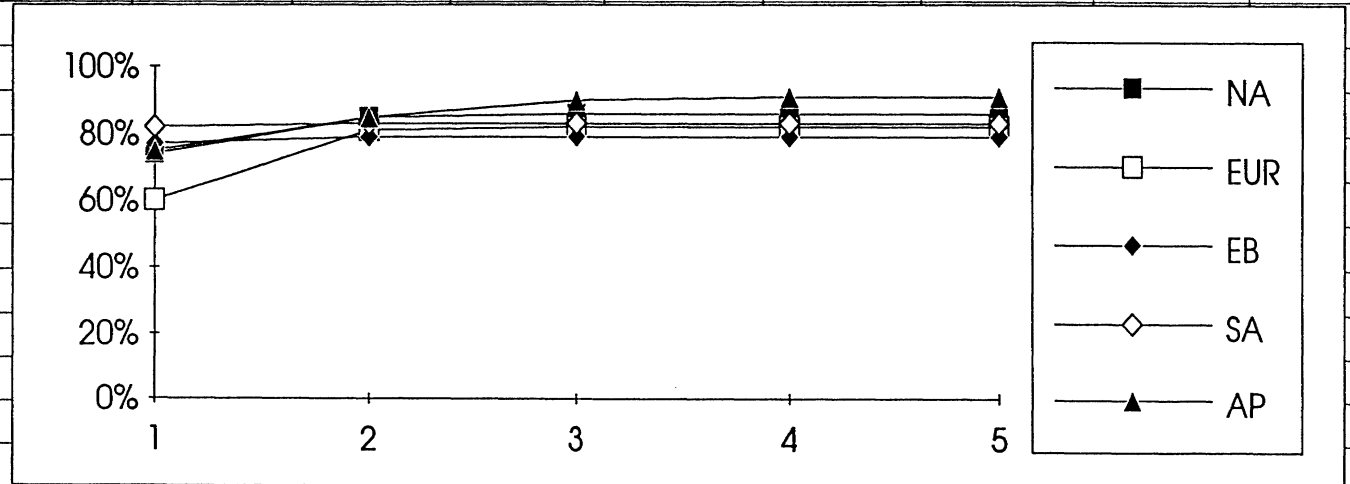
HOW COMPANIES PERCEIVE OUR SERVICE

		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	74%	11%	1%	0%	0%	14%
	EUR	60%	21%	1%	0%	0%	18%
	EB	77%	2%	0%	0%	0%	21%
	SA	82%	1%	0%	0%	0%	17%
	AP	75%	10%	5%	1%	0%	9%



HOW COMPANIES PERCEIVE OUR SERVICE

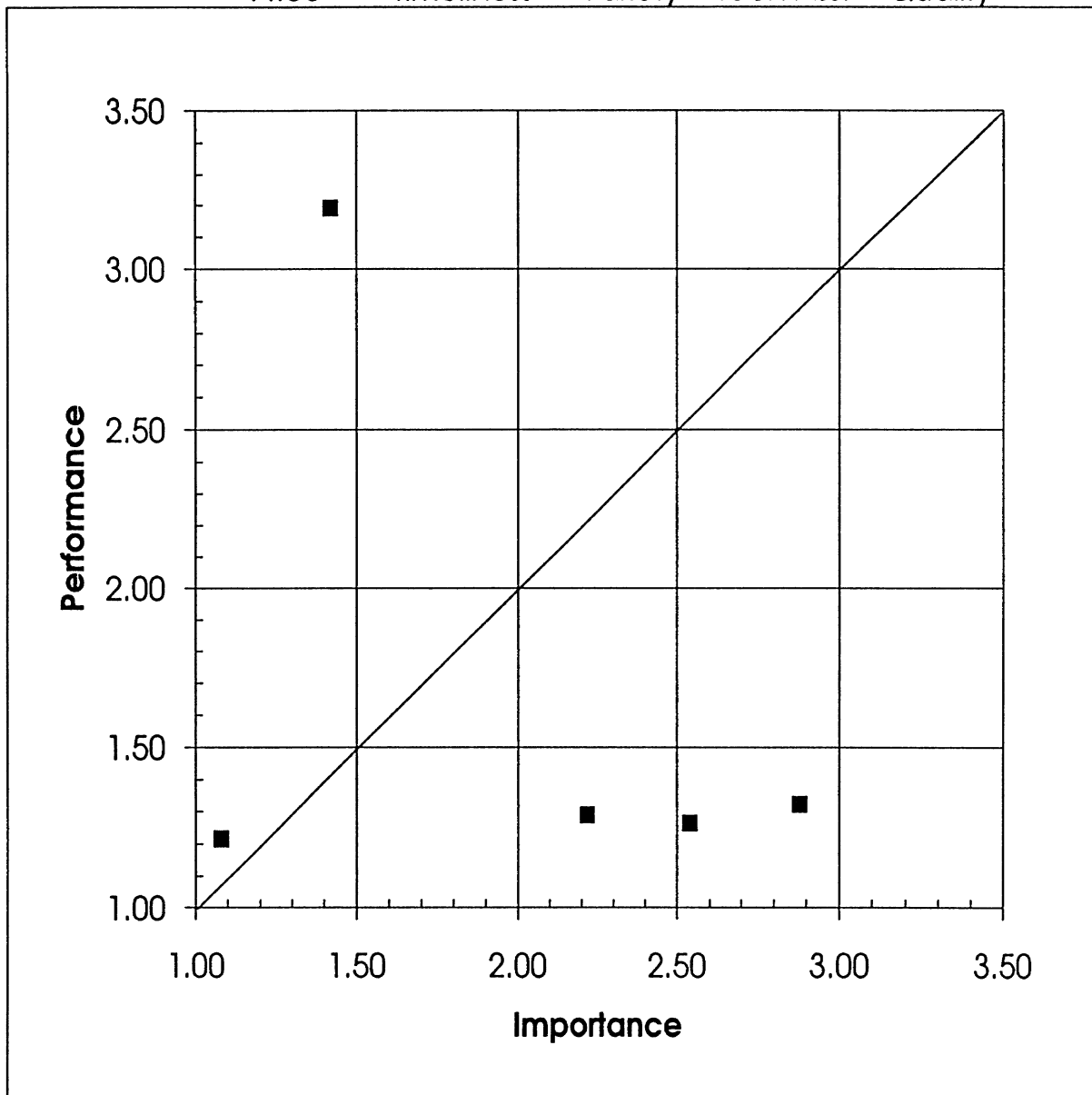
		RATING					
		Exceptional	Neutral			Unacceptable	Don't Know
		1	2	3	4	5	6
SERVICE TYPE	NA	74%	85%	86%	86%	86%	100%
	EUR	60%	81%	82%	82%	82%	100%
	EB	77%	79%	79%	79%	79%	100%
	SA	82%	83%	83%	83%	83%	100%
	AP	75%	85%	90%	91%	91%	100%



GAPS IN THE AVERAGE RATINGS OF IMPORTANCE and PERFORMANCE

REGION 1 - NORTH AMERICA

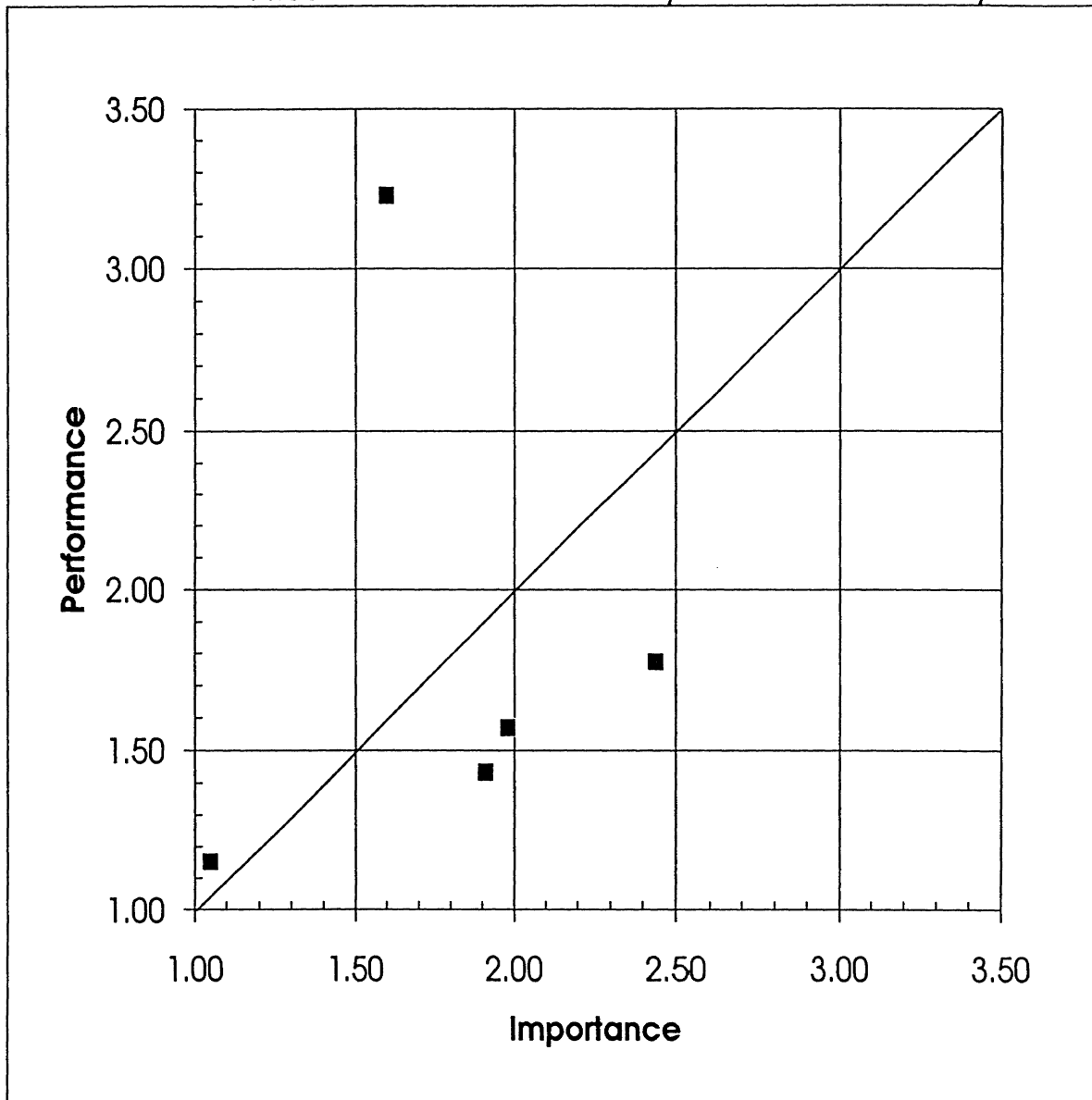
Importance	2.88	1.42	2.22	2.54	1.08
Performance	1.32	3.19	1.29	1.26	1.22
Gap	-1.56	1.77	-0.93	-1.28	0.14
	Price	Timeliness	Variety	Tech Asst	Quality



GAPS IN THE AVERAGE RATINGS OF IMPORTANCE and PERFORMANCE

REGION 1 - NORTH AMERICA (Med-Sml)

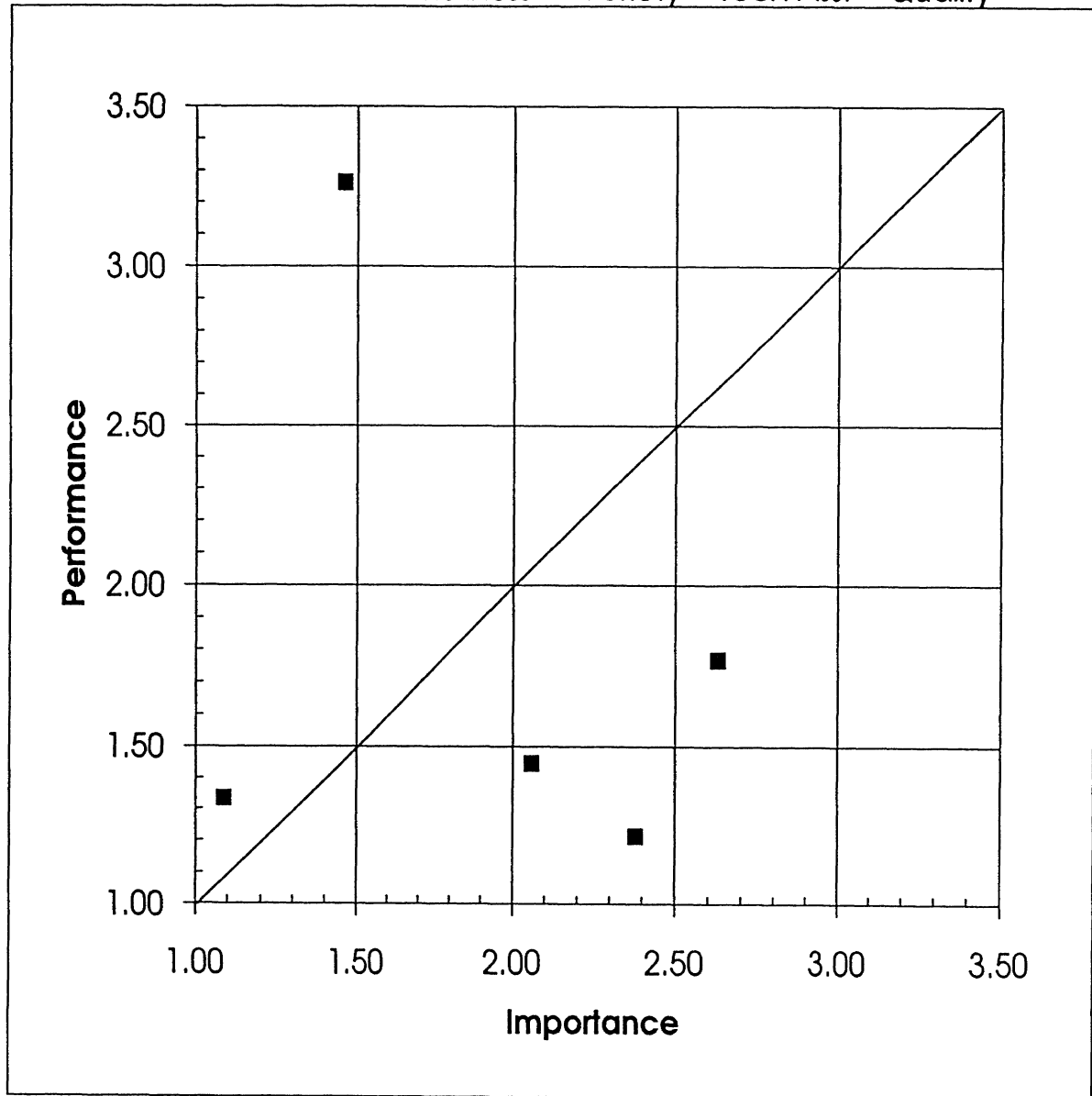
Importance	2.44	1.60	1.98	1.91	1.05
Performance	1.77	3.23	1.57	1.43	1.15
Gap	-0.67	1.63	-0.41	-0.48	0.10
	Price	Timeliness	Variety	Tech Asst	Quality



GAPS IN THE AVERAGE RATINGS OF IMPORTANCE and PERFORMANCE

REGION 2 - EUROPE

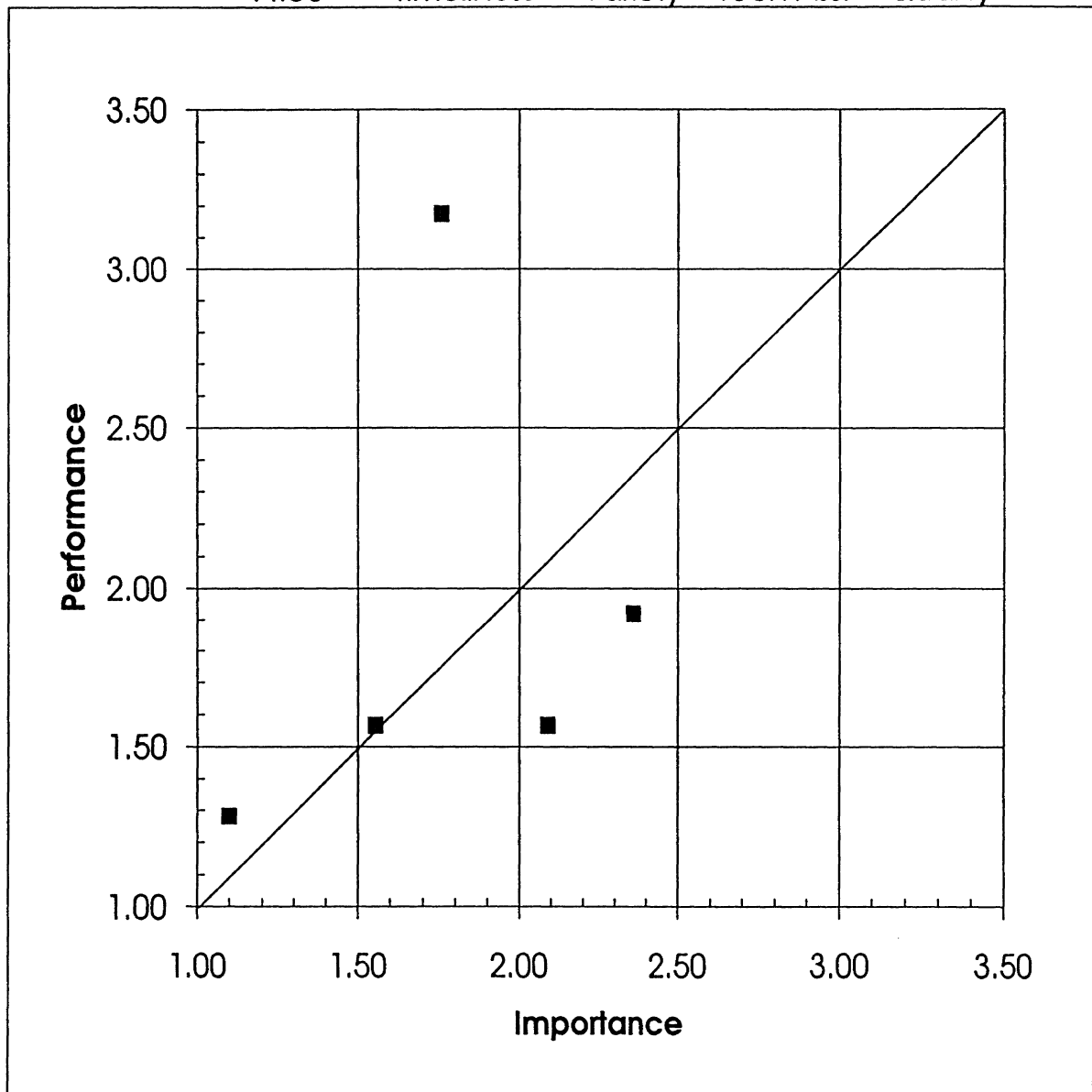
Importance	2.63	1.46	2.38	2.06	1.09
Performance	1.77	3.26	1.21	1.45	1.33
Gap	-0.86	1.80	-1.17	-0.61	0.24
	Price	Timeliness	Variety	Tech Asst	Quality



GAPS IN THE AVERAGE RATINGS OF IMPORTANCE and PERFORMANCE

REGION 2 - EUROPE(Med-Sml)

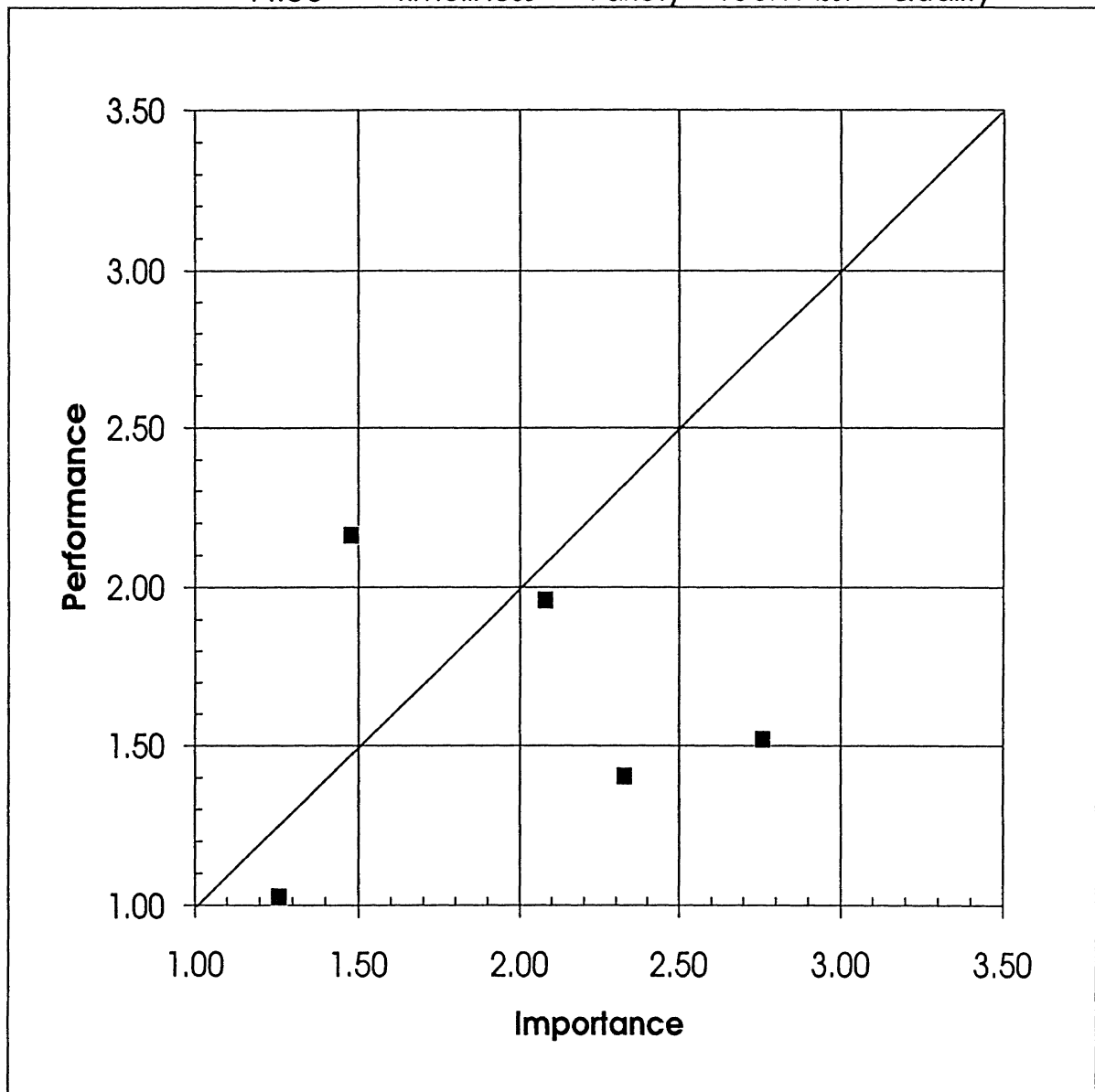
Importance	2.36	1.76	2.09	1.56	1.10
Performance	1.92	3.18	1.56	1.57	1.28
Gap	-0.44	1.42	-0.53	0.01	0.18
	Price	Timeliness	Variety	Tech Asst	Quality



GAPS IN THE AVERAGE RATINGS OF IMPORTANCE and PERFORMANCE

REGION 3 - EASTERN BLOC

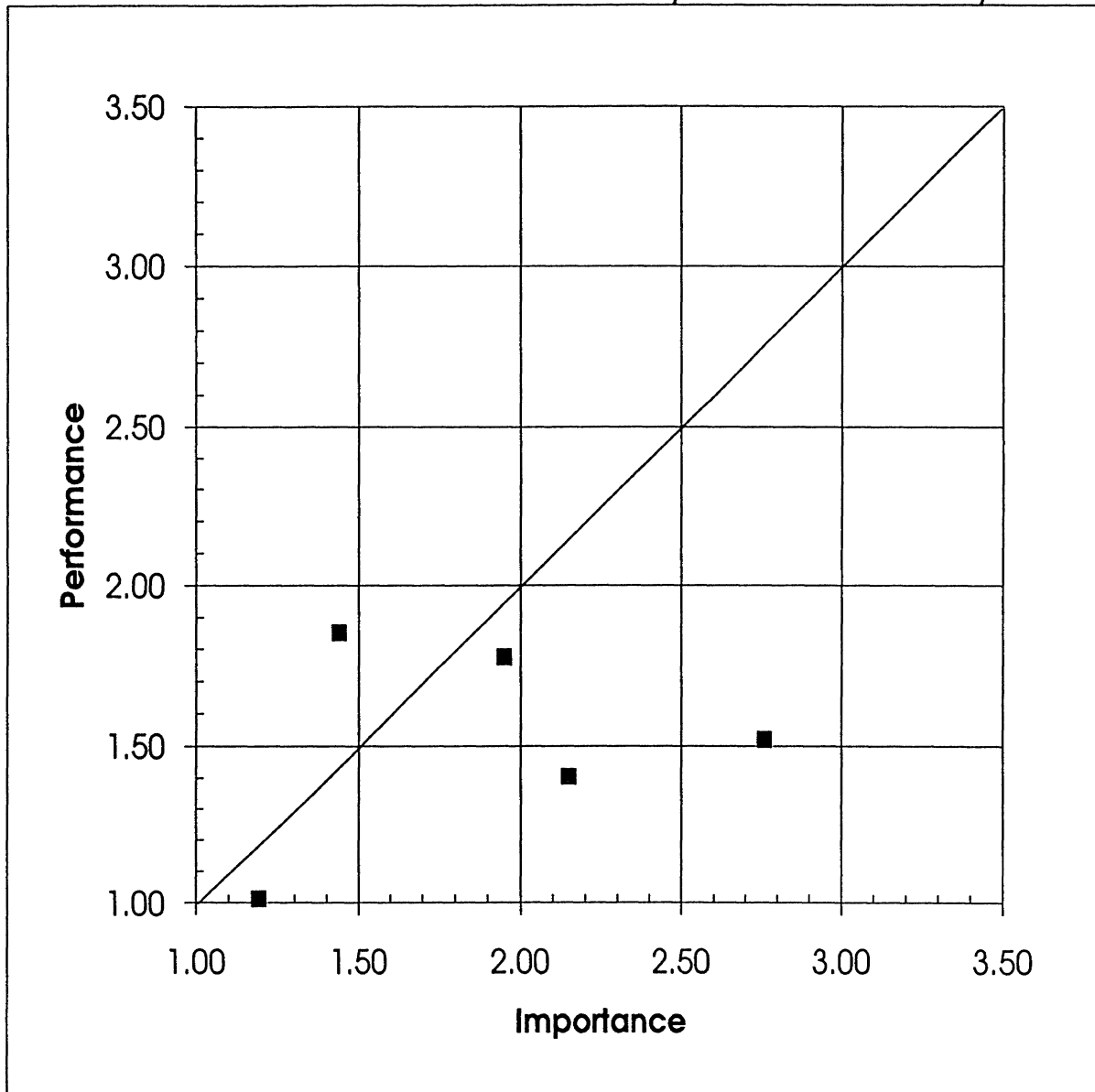
Importance	2.08	2.76	2.33	1.48	1.26
Performance	1.96	1.52	1.40	2.16	1.03
Gap	-0.12	-1.24	-0.92	0.68	-0.23
	Price	Timeliness	Variety	Tech Asst	Quality



GAPS IN THE AVERAGE RATINGS OF IMPORTANCE and PERFORMANCE

REGION 4 - SOUTH AMERICA

Importance	1.95	2.76	2.15	1.44	1.19
Performance	1.78	1.52	1.40	1.85	1.01
Gap	-0.17	-1.24	-0.75	0.41	-0.18
	Price	Timeliness	Variety	Tech Asst	Quality



GAPS IN THE AVERAGE RATINGS OF IMPORTANCE and PERFORMANCE

REGION 5 - ASIA PACIFIC

Importance	2.84	1.35	2.14	2.26	1.03
Performance	1.31	2.96	1.26	1.29	1.25
Gap	-1.53	1.61	-0.88	-0.97	0.22
	Price	Timeliness	Variety	Tech Asst	Quality

