

April 6, 2004

# Left Brain Marketing

by Eric Schmitt

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## Left Brain Marketing

by **Eric Schmitt**

with Chris Charron and Ayanna Lonian

### EXECUTIVE SUMMARY

Three technology trends — media fragmentation, addressability, and interactivity — are converging on the world of marketing and advertising. In a new era of Left Brain Marketing, analytical strategies grounded in deep audience knowledge will rise to predominance. Creative will remain essential but will play a smaller, more sophisticated role. The looming transformation of TV into an addressable medium marks the inflection point in the shift.

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This research is based on ongoing conversations with marketers and their agencies, service providers, and technology vendors.

#### **Related Research Documents**

"Offline Media Lose Valuable Customers To The Net"  
January 14, 2004, Brief

"TV Ad Targeting Creeps Over The Horizon"  
December 22, 2003, Brief

"The Internet's Big Impact On Media, 1998 To 2003"  
September 4, 2003, Brief Series

"The Essentials Of Integrated Marketing"  
February 27, 2003, Brief

"Marketing's New Vocabulary: Audience, Not Channel"  
February 13, 2003, Brief

"2003: The Year Of Consumer Control"  
January 28, 2003, Brief

"Mastering Marketing Measurement"  
September 16, 2002, Report

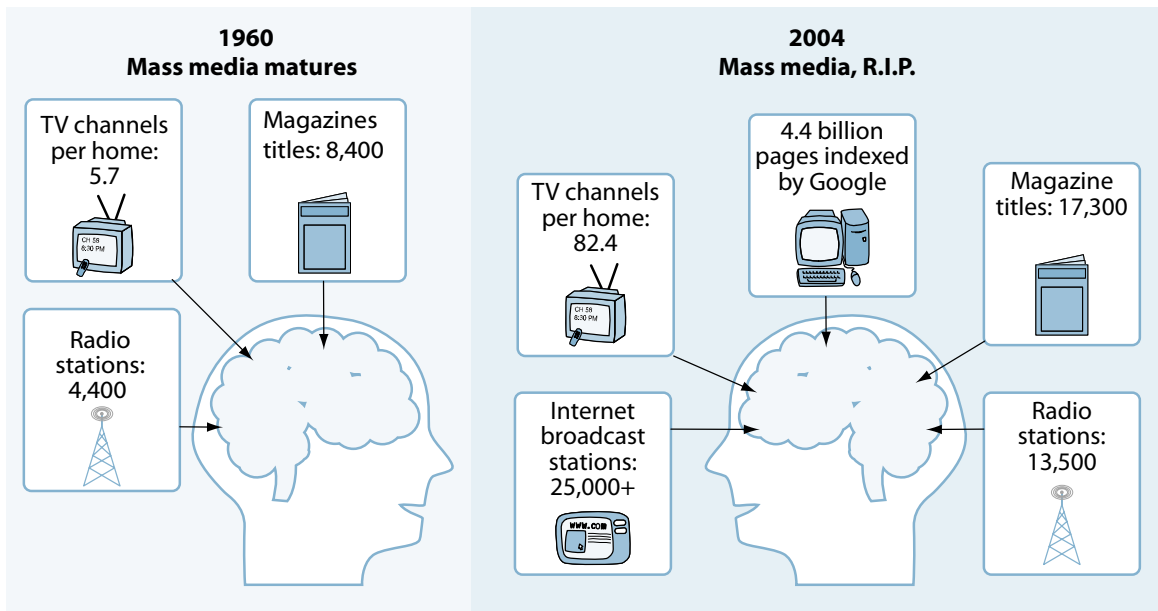
## TECHNOLOGY SHIFTS RECAST MARKETING

In the past year, Procter & Gamble, Coca-Cola, and General Motors have each threatened to cut mass-media TV budgets and promised to bring more accountability to their marketing programs.<sup>1</sup> This news resurfaces an old question: Is marketing an art or a science? Both, of course — but the balance is shifting. Since 1923, when Claude Hopkins first made his case for “Scientific Advertising,” the value of analytical marketing has steadily increased.<sup>2</sup> Today, demand for this expertise is accelerating, fueled by three underlying technology trends:

- **Media fragmentation.** Advances in computing and telecommunications have swept away media distribution barriers, releasing a Pandora’s box of new content (see Figure 1). The resulting fragmentation has shattered the notion of the mass-media consumer, forcing marketers to use hard quantitative data and analytical techniques to find and reach their audience. As Procter & Gamble CMO Jim Stengel recently said, “We must accept the fact that there is no ‘mass’ in ‘mass media’ anymore and leverage more targeted approaches.”<sup>3</sup>
- **Addressability.** Messages delivered via addressable media can be sent to unique individuals or households. The old addressable standbys of direct mail and telemarketing are now joined by digital channels like email and the Web — with TV soon to follow.<sup>4</sup> Old or new, all addressable channels share a common trait: They reward marketers that have mastered data management, customer analysis, and program testing and measurement.
- **Interactivity.** New media channels offer more than just addressability: They permit consumers to engage with firms in two-way dialogues. For their part, marketers can use these interactions to collect new market and customer data, test messages, and make up-to-the-second communications decisions. The Web is a powerful example of an interactive medium, but it is hardly the only one. Hilton, Bell Canada, and Washington Mutual, for example, also use software to guide the person-to-person interactions that occur in their lobbies and call centers.

### Media Fragmentation Creates New Obstacles

For consumers, the impact of media fragmentation is straightforward: more content and more choice. But for the marketing and advertising industry, the ramifications are more complicated — and more taxing — because:

**Figure 1** Digital Technology Opens A Pandora's Box Of Media Outlets

Source: FCC, Magazine Publishers Association, TV Dimensions 2003, Media Dynamics, NullSoft, TvRadioWorld

Source: Forrester Research, Inc.

- **When media fragment, audiences do, too.** By the 1980s, cable TV had shattered network audiences. Now the Web is raising the stakes, encouraging consumers to scatter their time across thousands of media niches, from specialty Net radio stations to the latest political blog. The upshot: Monolithic blocks of eyeballs are gone. In their place is a perpetually shifting mosaic of audience microsegments that forces marketers to play an endless game of audience hide-and-seek.
- **Fragmentation spawns inefficiency.** In response to fragmentation, many marketers and agencies have adopted a carpet-bombing mindset. Saturation *can* compensate for fragmentation, but only at tremendous cost, because any given message will inevitably reach some of the intended audience too often — and others not at all.<sup>5</sup> No surprise then, that the cost to put 30 seconds of TV in front of 1,000 Super Bowl viewers has nearly doubled between 1996 and 2004.<sup>6</sup> This year, marketers spent an average of \$2.3 million for the privilege — stark evidence of their willingness to pay a premium for large blocks of viewers.
- **Clutter impairs message recall.** Scorched-earth marketing strategies come at a price. The percentage of total TV content devoted to advertising has increased 39% since the early 1960s. Moviegoers suffer through 12 minutes of previews before seeing the film they paid \$10 for. A relentless stream of pop-up ads, spam, and now

product placements drones away in the background.<sup>7</sup> For consumers, the effect is numbing — for marketers, it is self-defeating (see Figure 2). Adding insult to injury, growing consumer affinity for multitasking attention — most notably in the form of simultaneous PC and TV use — further devalues attention.<sup>8</sup>

- **Media buying gets more expensive.** From a media buying perspective, fragmentation means more vendors and more contracts, and thus higher purchasing, administration, and measurement costs. This partly explains media consolidation efforts like Comcast-Disney, AOL-Time Warner, and Tribune-Times Mirror; suppliers are simply responding to what marketers are asking for — efficient access to large blocks of consumers.<sup>9</sup>

### Addressability Improves Measurement

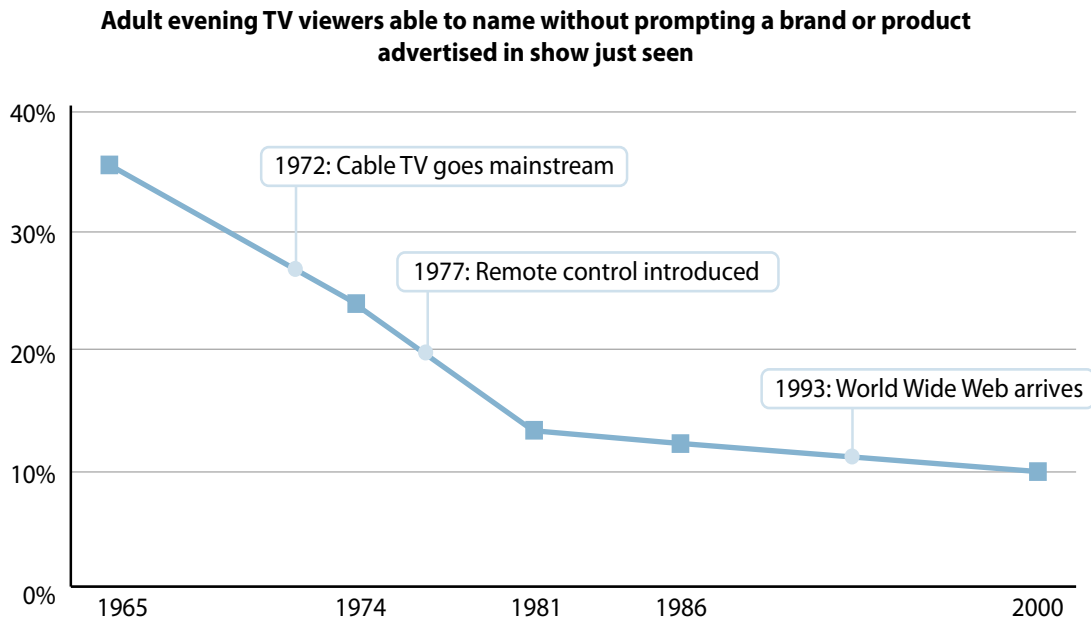
If fragmentation is a rain cloud for marketers, the ability to address a message to a unique household or individual is the silver lining. This is because:

- **Addressable media are targetable.** Ever since Montgomery Ward sent its first mail order price list in 1872, addressable media have inspired marketers to create measurable direct-to-consumer campaigns.<sup>10</sup> Today, the terminology has blurred — direct marketing, database marketing, CRM — but the underlying premise is the same:

If the contact channel allows it, communications can — and generally should — be tailored to the segment, household, or individual (see Figure 3).

- **Addressable media are measurable.** Catalogers, credit card issuers, and other direct sellers have long taken advantage of addressability to test and measure their direct mail and telemarketing programs. American Express has become so comfortable with these techniques that during the past 10 years it has shrunk TV spending from 80% to 35% of its overall marketing and advertising budget.<sup>11</sup> Now, measurable media can be had on the cheap, in the form of email and the Web. This is attracting new investment from manufacturing industries that don't sell direct to consumers, like auto, pharmaceuticals, and consumer packaged goods.
- **Addressable media adoption is increasing.** The proportion of time that consumers spend on addressable media is growing. For example, 24% of consumers tell us that since going online, they have decreased their use of television.<sup>12</sup> Another 20% say the same about newspapers and magazines. And TV itself is becoming addressable: By 2007, 38.8 million US households will have uniquely identifiable digital cable boxes.<sup>13</sup>

**Figure 2** How Television Ad Recall Has Declined



Source: Newspaper Association of America, Cabletelevision Advertising Bureau, and Nielsen Media Research

Source: Forrester Research, Inc.

**Figure 3** Which Media Are Addressable?

Addressability: ○○○○ None ●○○○ Limited ●●○○ Strong ●●●○ Excellent ●●●● Excellent (in the future)

	Type of addressability			
	Geography	Household or device	Individual	Cost per contact
Email	●●○○	●●○○	●●●○	Very low
Point of sale (with loyalty or ID card)	●●●○	●●●○	●●●○	High
Postal mail	●●●○	●●●○	●●●○	Very high
Print, broadcast, and outdoors	●○○○	○○○○	○○○○	Low
Telemarketing	●●○○	●●●○	●●○○	High
TV (cable with ad targeting)	●●○○	●●●●	○○○○	Medium
Web ad (with cookies)	○○○○	●○○○	○○○○	Low
Web site (with login)	○○○○	●○○○	●●●○	Medium

Source: Forrester Research, Inc.

## Interactivity Brings New Opportunities

Even as they are confronted by fragmentation and addressability, marketers face a third game-changing shift: interactivity. The adoption of interactive channels gives marketers:

- **Valuable new customer information — and the chance to streamline sales cycles.** By definition, interactive two-way mediums allow marketers to engage their audience in back-and-forth dialogues. Properly structured, these interactions offer marketers a wealth of precious data exhaust. For example, when visitors to the Mercedes-Benz Web site use the online vehicle configurator, Mercedes gets a real-time window into the demand for its new models — and a pile of qualified leads to boot. In real estate and insurance, search tools and quote generators offer definitive evidence that interactivity can be used to accelerate buying decisions and decrease the cost of sales.
- **The ability to make smart communications decisions on the fly.** Interactivity is most powerful when used in conjunction with addressable media, as in the case of a shopper logged in to Amazon.com or a bank customer who has just entered his PIN number into an automated phone system. In these scenarios, marketers can use software to make communications decisions on the spot, taking both historical customer knowledge *and* up-to-the-second behavioral data into account. This rules-driven approach to communications presents technical and business challenges that many marketers have never faced before — but are now racing to overcome.<sup>14</sup>
- **A new arsenal of cross-channel techniques.** Some of the most intriguing examples of interactivity operate across channels. For example, Mitsubishi Motors ran a cliffhanger 30-second Super Bowl spot that prompted at least 290,000 curious viewers to seek out the conclusion at SeeWhatHappens.com.<sup>15</sup> In the packaged goods industry, firms like Frito-Lay are successfully turning on-package promotions into online registrations. The upshot: Multichannel interaction sequences offer new — and often inexpensive — ways for marketers to engage their customers and prospects.

## THE SHIFT TO LEFT BRAIN MARKETING

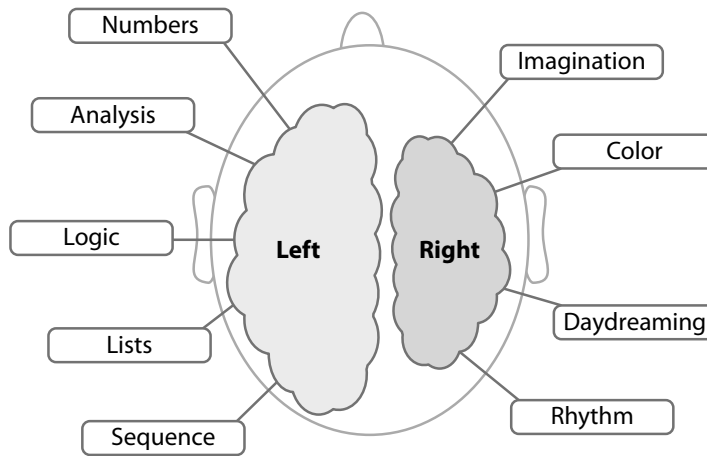
Marketing has always been based on the relationship between communications and human behavior. But now the forces of media fragmentation, addressability, and interactivity are imposing dramatic change on both sides of the equation. Traditional marketing strategy — the application of great creative to large groups of anonymous people — is becoming less effective by the day. Marketing must adapt. We call the outcome of this adaptation Left Brain Marketing, defining it as (see Figure 4):

*The rise to predominance of analytical marketing strategies, skills, and processes that are centered on audience knowledge, not media.*

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**Figure 4** Marketing Is Becoming More Science Than Art
 

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**As Left Brain Marketing unfolds:**

*Applied science . . . eclipses applied creativity.*

*Repeatable processes . . . replace ad hoc programs.*

*Precise analysis . . . replaces fuzzy measurement.*

*Statistical models . . . replace focus groups.*

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Source: Forrester Research, Inc.

### How Left Brain Marketing Works

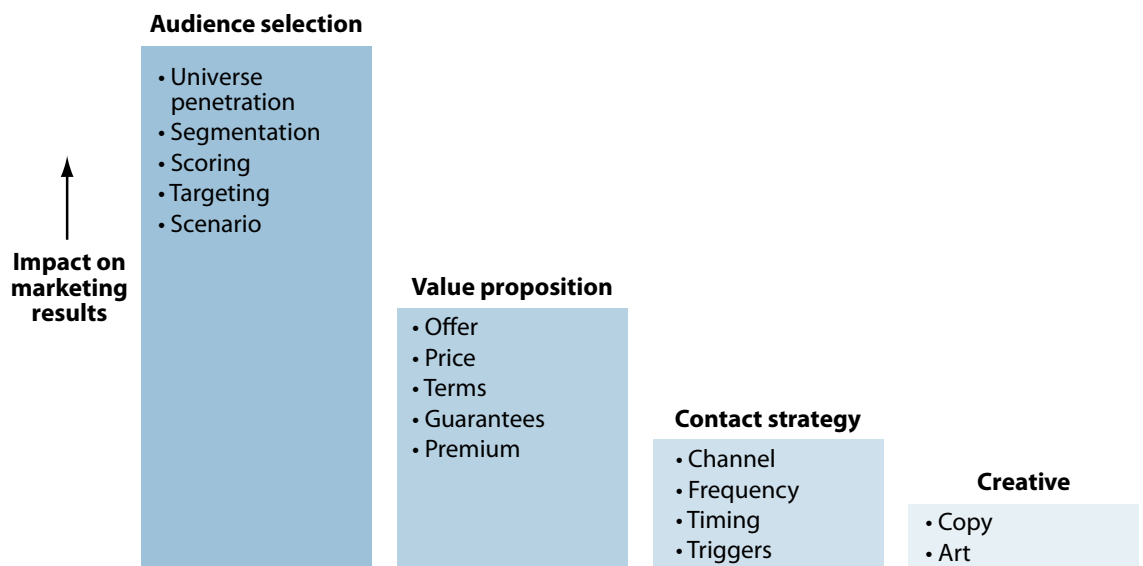
The implications of fragmentation, addressability, and interactivity vary by industry and by firm, but the most successful Left Brain Marketing programs will share common characteristics — an evolution of the same traits that mark great direct and database marketing.

- **Strategy rooted in audience knowledge.** At its core, Left Brain Marketing suggests that to find and reach the right audiences, marketers must know more about them. As John Hayes, CMO of American Express, recently put it: “We have to adapt to the new landscape by not thinking in dayparts but mindparts.” This philosophy represents an evolution of the old direct marketing rule, which says that 40% of a program’s success is due to list, 40% to offer, and 20% to creative (see Figure 5).<sup>16</sup> Firms with a rich and up-to-date understanding of their audience will enjoy competitive advantage,

since they can use this knowledge to exploit inefficiencies and fill market gaps faster than competitors. Practically speaking, it makes the unglamorous work of managing customers and prospect data a critical marketing competency.

- **Analytical blood.** Left Brain Marketing shares a lot of test-and-measurement DNA — like control groups and split-runs— with its predecessor, direct marketing. It also draws on database marketing and CRM concepts like predictive modeling and lifetime value. But Left Brain Marketing goes further by encompassing advanced techniques like contact optimization and experimental design. It also emphasizes holistic, multichannel customer analysis. For example, one retailer is probing the value of Sunday newspaper inserts by pulling them from a test market, using its loyalty card to measure the impact on different customer segments — and then comparing the results to similar markets in which the flyers were run.<sup>17</sup>
- **A strong, centralized operation.** In most firms, database marketing organizations are highly concentrated and often have embedded technology staff. The reason for this structure is simple: Effective below-the-line marketing requires fusing analytical, technical, and marketing skills.<sup>18</sup> Left Brain Marketing embraces this model for the same reason.<sup>19</sup> Centralization also allows for the efficient management of customer data, the ability to service multiple product lines, and the simplified development of integrated, cross-channel communications programs.

**Figure 5** Audience Selection Has The Most Impact On Marketing Results



Source: Digitas, Merkle Direct Marketing, and Forrester Research, Inc.

## The Right Brain's Role In Left Brain Marketing

Left Brain Marketing will see issues like customer data management, segmentation schemes, and predictive models rise in strategic importance. But what about the brainstorming, creative reviews, and media budgeting that dominate the discipline of marketing today? These cornerstones of the creative process will (see Figure 6):

- **Expand into new territory: Scenario Design.** Today, scenario designers work for interactive agencies, usually designing two-dimensional Net campaigns on shoestring budgets. This will change as firms realize the value of modeling sequences of customer interactions in advance.<sup>20</sup> The next generation of creative designers will draw on the discipline of game design to design adaptive, multichannel scenarios that respond to both historical and real-time response information.
- **Become multiplexed.** Instead of inefficient, one-size-fits-all branding campaigns, creatives will develop dozens, or even hundreds of permutations on the same theme. This technique — already in use by many direct mailers — will spread to TV, where commercial directors will take advantage of component-based video production techniques and cable's new ad targeting capabilities.
- **Be turned upside down.** Instead of trying to transform brand image sessions into creative inspiration, art directors will take their cues bottom-up, directly from customer data and input. SAS-wielding statisticians will sit side by side with artists, transforming analytical customer insights into storyboard mockups on the spot. For example, an analyst at a wireless carrier might discover a churn-prone cluster of customers who make heavy use of text messaging — but carry old mobile phones. With help from a creative peer, the two could present the problem to management *along with* a proposed solution — storyboards and ROI forecast included.

## Who Is Practicing Left Brain Marketing?

Many marketing organizations are evolving toward Left Brain Marketing. But companies that interact directly with consumers — such as financial services providers, hotel chains, and retailers — are leading the way. Three of the best examples we have seen:

- **Physicians Mutual Insurance Company.** This health and life insurer became an industry pioneer four years ago, when it first introduced the role of customer segment manager. Today, the company sorts its million-plus customers into 50,000-plus microsegments according to expected lifetime value and other criteria. These roll up to four segment managers, each of whom has strategic responsibility for product development and go-to-market decisions that affect customers in their segments.

**Figure 6** The New Role Of Creative In A Left Brain World

	The creative process today	The creative process in an era of Left Brain Marketing
Objective	Awareness, traffic, or response	Specific behavior changes, activities, or outcomes
Design point	Time- or space-defined units (e.g., 30-second spot, half-page ad)	Sequences of interactions, scenarios, across channels
Audience strategy	Reach a monolithic mass of eyeballs	Target portfolio of consumer segments
Messaging strategy	Communicate a single, universal, brand or product attribute	Communicate customized, audience-specific brand or product attributes
Timing	Set by marketer's schedule	Triggered by audience behavior
Communications philosophy	The medium is the message.	The segment is the message.

Source: Forrester Research, Inc.

- **Intrawest.** In 2002, this \$1.1 billion resort operator broke from its organizational history, building a corporate marketing group to service local properties. In 2001, it had run just 50 campaigns — this year, it will run more than 2,400. Recognizing that many of its customers don't know the corporate brand, most programs are run to support specific local properties. One of the most successful: weather-triggered snow blast emails that go out first thing in the morning, tempting local customers to call in sick and come ski.
- **CVS.** This 4,000-store pharmaceutical chain embraced analytical marketing when it took its loyalty card marketing program national in 2001.<sup>21</sup> Today, its 34 million-plus cardholders drive more than half of the chain's non-pharmaceutical revenues. The company engages these customers with a point-of-sale system that prints account balances and offers on receipts. A subset of high-value cardholders receive regular direct mail newsletters with a selection of customized offers made according to consumer purchase history, demographics, and corporate marketing objectives.

## WHAT IT MEANS

### WHAT LEFT BRAIN MARKETING MEANS

- **Addressable TV is a watershed.** If the shift to Left Brain Marketing has an inflection point, it is TV ad targeting. This point is approaching fast: Recently, the advertising sales division of Comcast began selling products that allow customized commercials to be delivered to 22 million households. The system is based on geographic segments with an average of 18,750 homes — a far cry from the precision of direct mail, but granular enough to offer real benefits to marketers in industries from automotive to insurance. By year's end, Comcast says it will reach 30 million homes in 19 of the top 25 DMAs, a total of roughly 1,600 segments.
- **Agencies will ditch the holding company model.** Within agency conglomerates, the importance of audience knowledge is already crystallizing, as firms like Publicis Groupe witness their media agency subsidiaries gaining on their creative brethren. But this trend only underscores a larger external threat: In the world of Left Brain Marketing, firms like Accenture, Acxiom, Deloitte Touche Tohmatsu, and Epsilon have as much of a claim on marketing services as Interpublic Group, WPP, and Grey Global Group do. Look for an agency holding company to respond by consolidating its technical, analytical, and direct marketing resources into a single entity. Omnicom Group should start by combining Targetbase and Rapp Collins Worldwide.
- **Marketing ethics becomes a defining issue.** The backlash from privacy breaches at Eli Lilly and JetBlue Airways only foreshadow the skirmishes to come. Organizations that regularly sell customer data, such as publishers, catalogers, and the US Postal Service, will come under the spotlight. Vendors like Experian and ChoicePoint will face pressure to separate their consumer data and database management businesses. But the largest questions will involve how marketers themselves use consumer data. Lawsuits will challenge the ethics of predictive models that factor in credit score, age, and ethnicity, as lawyers argue the distinction between redlining and preferred treatment.

## RECOMMENDATIONS

### WHAT FIRMS SHOULD DO TO PREPARE FOR LEFT BRAIN MARKETING

- **Codify the handling of customer data.** No matter whether the issue is rented lists of prospect names, privacy policies, contact management governance, or the use of sensitive customer data as inputs to predictive models, the bottom line is the same: risk management. Smart firms will establish a lexicon for describing customer data processes — and a set of guiding management principles. Discipline in this area will help companies react quickly to changes in public attitudes, corporate policy, and government regulation.
- **CEOs: Give marketing a voice in every interaction.** The most effective Left Brain Marketing organizations will have a voice in every customer contact, no matter the channel or the point in the customer life cycle. CEOs can encourage this by vesting marketing teams with political and budgetary clout — then infusing them with enough technology savvy to get the job done.

## SUPPLEMENTAL MATERIAL

### Methodology

This research is based on ongoing conversations with marketers and their agencies, service providers, and technology vendors.

### Forrester's Peer-To-Peer Programs For Marketers

Forrester's Oval programs provide marketers at large business-to-consumer companies with expert advice and a peer-equivalent network for their most pressing issues. Our offerings consist of our CMO Group, Database Marketing Council, and Email Marketing Council. To learn more about our executive marketing programs, please contact your Account Representative for more information.

## ENDNOTES

- <sup>1</sup> In his February 12, 2004, remarks to the AAAA Media Conference, P&G CMO Jim Stengel pointed out that 10 years ago, the company spent 90% of its marketing budget on TV, but he then said, "Today, we're discovering life beyond the 30-second TV spot." GM's vice chairman has ordered his marketers to focus less on TV advertising. Source: *The Kansas City Star*, February 6, 2004. In a 2003 speech, Cola-Cola President and Chief Operating Officer Steve Heyer said, "Corporate marketers will not reflexively turn to TV advertising." Source: *The Wall Street Journal*, November 23, 2003.
- <sup>2</sup> Claunder Hopkins opened his seminal book with the line, "The time has come when advertising has in some hands reached the status of a science." He went on to praise the value of running test campaigns and carefully measuring results, saying, "We cannot often follow all the principles of mail order advertising, though we know we should."
- <sup>3</sup> Source: Jim Stengel's February 12, 2004, remarks to the AAAA Media Conference.
- <sup>4</sup> Forrester believes that by the end of 2006, cable operators will have the infrastructure in place to support household-level ad targeting. Geography-based targeting systems will come online later this year. See the December 22, 2003, Brief "TV Ad Targeting Creeps Over The Horizon."
- <sup>5</sup> Another important effect of audience fragmentation is the way in which it complicates and distorts the measurement of bellweather ad metrics like frequency.
- <sup>6</sup> The average Super Bowl CPM was less than \$15 in 1996 and almost \$25 in 2004. Based on Nielsen Media Research and Advertising Age data. See [http://www.adage.com/images/random/superbowl04\\_chart2.pdf](http://www.adage.com/images/random/superbowl04_chart2.pdf) for more information.
- <sup>7</sup> According to TV Dimensions 2003, the amount of TV content devoted to commercials now stands at 23%, up 39% from the early 1960s, and 21% since the early 1980s. Our own consumer research tells us that 71% of consumers say they receive too many emails, and 77% delete most email advertising without reading it. Source: Forrester's Consumer Technographics® Q4 2003 North American Study.

- <sup>8</sup> A total of 83% of consumers say they do other activities while watching TV, a figure that rises to 90% in the 18- to 34-year-old age group. The Net accounts for a significant share of the distraction: 18% of TV viewers tell us they were online the last time they watched TV. See the March 23, 2004, Trends “Multitasking Dilutes Media Attention.”
- <sup>9</sup> Cross-vendor standards can also be used to aggregate audiences, but they are few and far between. Three notable examples are the US Postal Service, email delivery standards, and NCC’s cable interconnects, which simplify ad buys across cable networks.
- <sup>10</sup> In his book “On Being Direct,” Lester Wunderman details an important milestone in the evolution of direct marketing: segment-level analysis. In the late 1940s, for a mail order rosebush company called Jackson & Perkins, Wunderman hit on the idea of breaking customers into groups based on factors like their frequency of purchase and monetary value.
- <sup>11</sup> Source: John Hayes, CMO of American Express, as quoted at the 2004 Madison & Vine conference by AdAge.com, February 23, 2004.
- <sup>12</sup> here’s more bad news: Consumers who ditch offline media in favor of the Net are valuable customers. They are more educated, tech-optimistic, and earn slightly more money. See the January 14, 2004, Brief “Offline Media Lose Valuable Customers To The Net.”
- <sup>13</sup> According to Forrester’s Consumer Technographics® Q2 2003 North American Study, 20 million US households had satellite, while 19 million had digital cable. But if consumers hold to their stated intentions, digital cable will surpass satellite: Digital cable will grow by 3.0 million subscribers this year, or 15%, while satellite will grow by only 2.2 million, or 10%. See the February 18, 2004, Market Overview “Digital Cable Overtakes Satellite.”
- <sup>14</sup> Financial services companies have been among the most aggressive adopters of this technology. Some of the technical challenges they face include the integration of analytical data marts into real-time transactional environments, coordination between inbound and outbound programs, and the challenge of managing complex, rules-based environments.
- <sup>15</sup> The spot resulted in at least 290,000 unique visitors to Mitsubishi’s site during the five days following the Super Bowl. For more information, see AdAge.com.
- <sup>16</sup> Direct mail veterans credit Ed Mayer with the invention of this formula.
- <sup>17</sup> Forrester understands that when two firms compete for the same audience, in the long run the company that applies analytical techniques to consistently achieve a lower per-contact message delivery cost will enjoy a competitive advantage. Conversely, firms that spray marketing messages inefficiently, discriminating only on the grounds of media consumption or broad demographics, will be penalized.
- <sup>18</sup> Because of the limited availability of these multidisciplinary skill sets, many firms outsource their marketing databases to third-party service providers. See the March 14, 2003, Brief “The Value Of Database Marketing Service Providers.”

- <sup>19</sup> This is not to say that there is no place for distributed organizations. Field operations like branches, agents, and franchisees will gain from a centralized service bureau model, too, through cheaper tools and process support. Finally, a single, strong marketing team will help with the internal politics of data control and influence at all points of customer contact.
- <sup>20</sup> Scenario Design is an emerging discipline that helps companies to systematically redesign customer-facing business processes. See the September 13, 2001, Report “Cross-Channel Scenario Design.”
- <sup>21</sup> CVS, a US chain of more than 4,000 retail pharmacies, recorded an 8.4% increase in same-store sales during 2002. The company attributes a good portion of its success to its ExtraCare card program, calling it “the backbone of our growth strategy.” See the June 5, 2003, Brief “CRM Best Practices: CVS Loyalty Card Marketing.”

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#### **Consumer Forum**

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#### **Financial Services Forum Europe**

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#### **Executive Strategy Forum**

November 3–5, 2004

The Westin Copley Place  
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November 22–23, 2004

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#### **Emerging Technology Showcase**

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