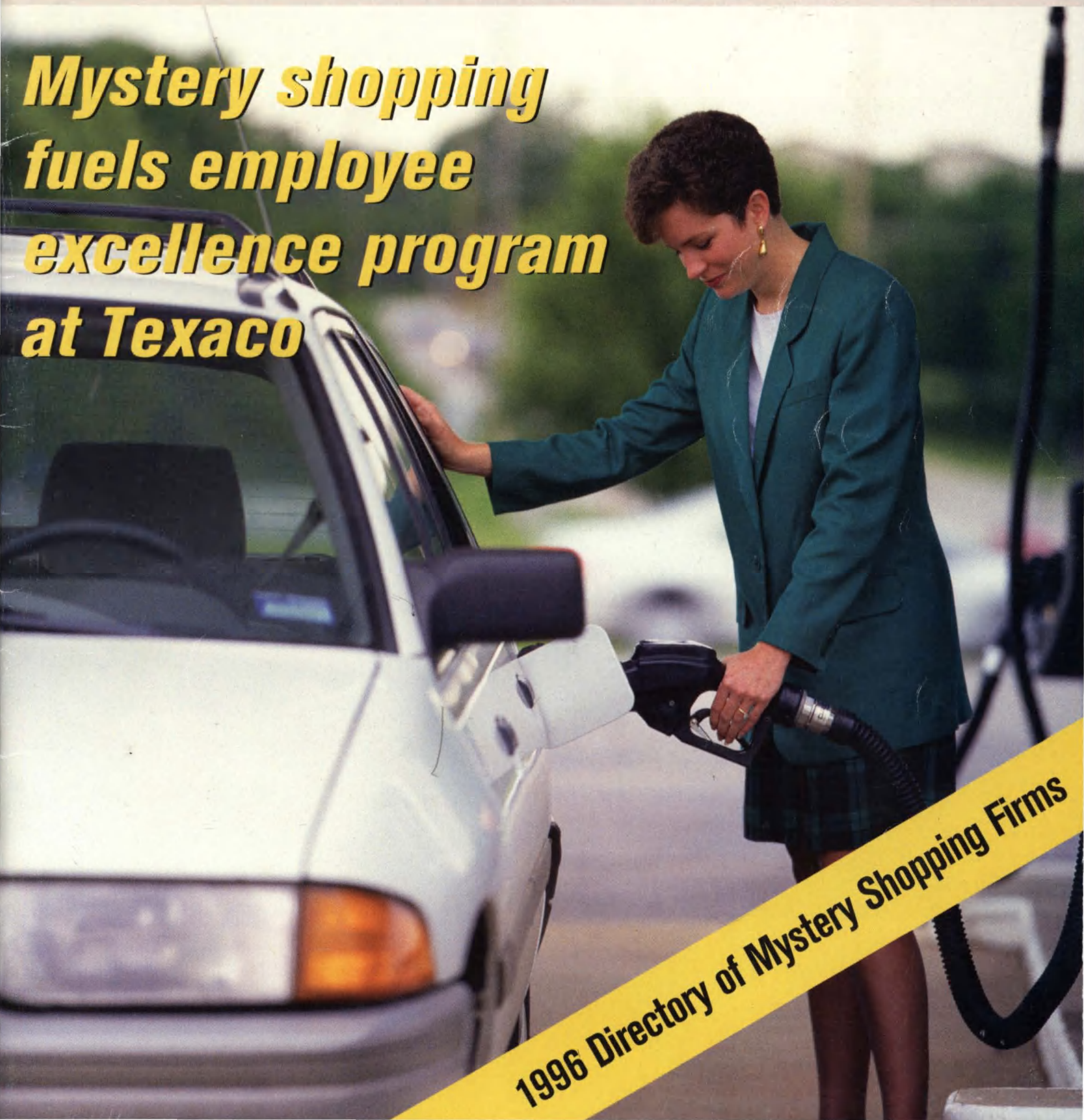
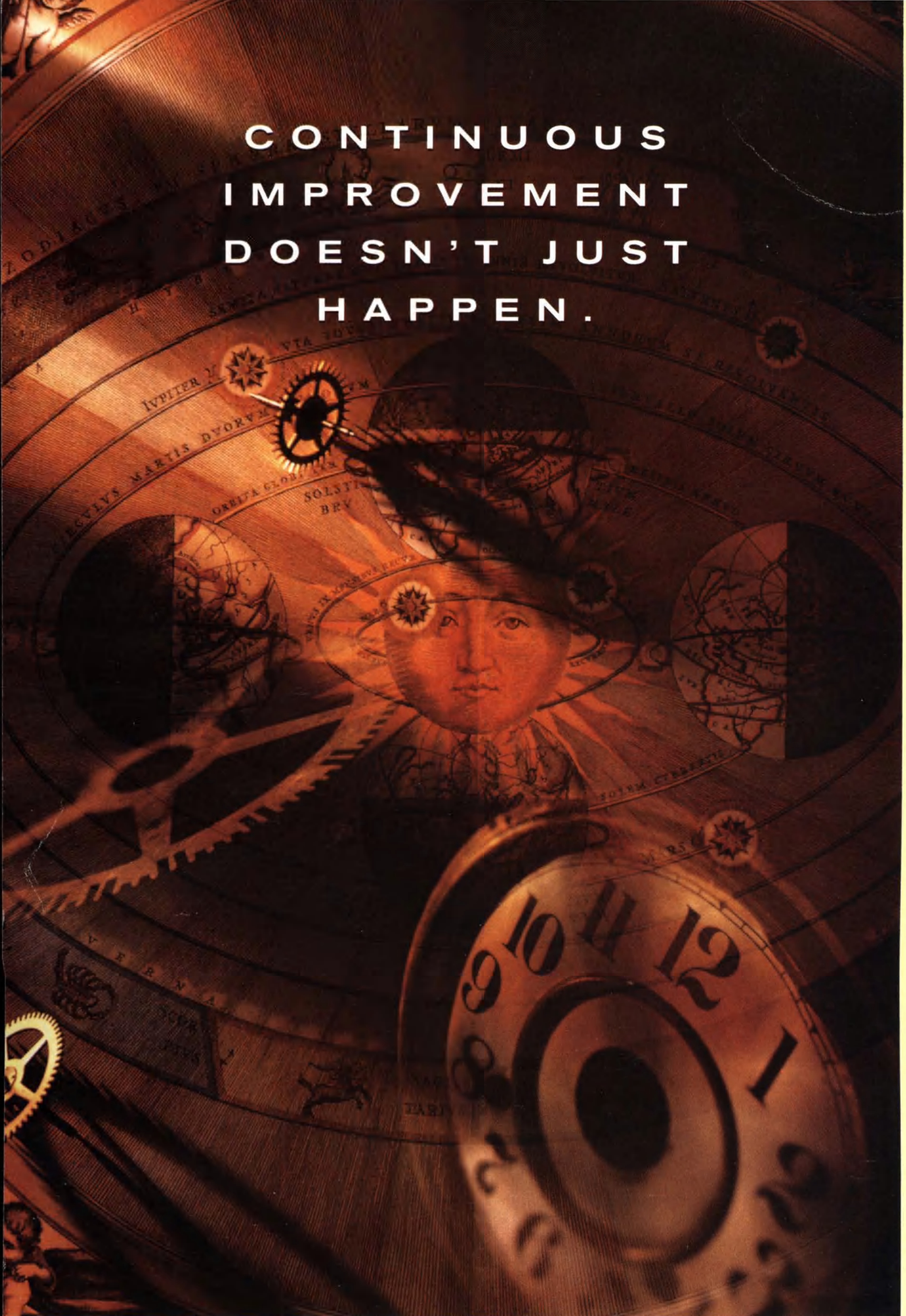
1996 Ethnic Research Directory • Felipe Korzenny interviewed • Bootstrap technique

January 1996

# Quirk's MARKETING RESEARCH Review

*Practical applications in marketing research*



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Col%
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Germany
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Edge 1
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Layers

Quirk's
MARKETING RESEARCH
Review

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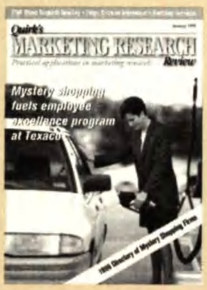


Volume X, Number 1 January 1996

**Cover**
Employees at Texaco are aware of the need to treat each customer in a special way due to the company's *Building Tomorrow Together* program. Photo courtesy of Texaco Refining and Marketing Inc.

## FEATURES



## DEPARTMENTS



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**Editorial policy**: We invite submission of manuscripts from outside sources. Write or call for guidelines. Send press releases and other editorial material to Joseph Rydholm, editor. We reserve the right to edit any manuscript.

# Survey Monitor

## Complaining shoppers may be a store's best customers

A new national survey of department store customers reveals the complaints window may offer a true bounty for managers — it's the place to meet a store's most satisfied customers.

It may seem counter-intuitive but the customer most likely to complain also is most likely to be one of the store's best and most loyal customers, according to a national survey of 1179 department store customers by Burke Customer Satisfaction Associates, Cincinnati. Moreover, the complainers also are those most likely to expect that their problems with a department store will be resolved to their satisfaction. The Burke CSA study, which identifies factors that create a department store "secure customer," found that a complainer is often a loyal customer who cares enough to seek redress and expects a positive outcome.

Of the department store customers surveyed by Burke, three-fourths either definitely or probably would report a problem directly to store management. Of these potential complainers, three fourths expected that they would reach satisfactory resolution with the store. Significantly, those who said they would complain were more likely to be the most frequent shoppers — 54 percent of those who shop every two to three weeks versus only 45 percent of those who shop once or twice a year.

That a store's best customers are the most likely to complain makes perfect sense to Carey Watson, senior vice president of marketing for Burdines department store in Miami. Watson regards complaints as a positive thing, especially from frequent shoppers who are traditionally a store's strongest supporters. "When a customer is loyal to your store, they care about you. So when you disappoint them, it's a kind of shock. When they complain, they are saying, 'Hey, it's unusual but you've let me down and I just wanted to let you know.' It's very healthy," says Watson.

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## Word-of-mouth most powerful with 20-somethings

Pssst. Pass it on...The latest MLLEMeter report from *Mademoiselle* magazine and Roper Starch Worldwide Inc. reveals that women in their 20s are more vocal than older women about recommending specific products they like. Twentysomething women are more likely to pass along a good word about clothing, computer equipment, electronics, personal investments and alcoholic beverages. Long distance phone service, TV shows, restaurants and airlines are endorsed less frequently. These findings are based on face-to-face interviews in respondents' homes with a nationally representative sample of 1,000 women age 18+. Base: consumers who made a product/service recommendation in the past year. For more information call Sarah Duffy-Edwards at 914-833-0232.

**If recommended to others, how many did you tell (on average)?**

| | Twentysomething Women (Ages 18-29) | Boomer Women (Ages 30-49) |
|---|---|---|
| Clothing | 7.1 people | 3.3 people |
| Computer software | 6.8 people | 2.8 people |
| Consumer electronics | 5.6 people | 2.9 people |
| Liquor/wine/beer | 4.3 people | 3.6 people |
| Airline | 4.3 people | 3.8 people |
| TV shows | 4.3 people | 3.8 people |
| Car | 4.1 people | 3.7 people |
| Long distance phone service | 4.1 people | 3.9 people |
| Restaurant | 4.1 people | 3.9 people |
| Insurance | 4.0 people | 2.4 people |
| Investments | 3.7 people | 2.2 people |

# Product & Service Update

## New forecasting and planning system from Equifax

Equifax Business Geo-Metrics, San Diego, now offers ProphetPoint, a market forecasting and planning system. ProphetPoint integrates databases from several business information providers, including The WEFA Group, American Business Information and Equifax National Decision Systems, allowing automated PC access to data on more than 10 million businesses across the U.S., spanning 1,000 SIC codes, with forecast and demand data and geographic breakouts ranging from ZIP Code and county levels to MSA, state and national aggregations. Market studies can be produced in the form of spreadsheets or detailed maps. For more information call 800-699-8990.

## SAS unleashes the Orlando release

SAS Institute, Cary, N.C., now offers the SAS System for Analytic & Technical Applications, dubbed the Orlando release for the location where it was previewed to more than 3,000 SAS software customers. Now shipping for PCs and UNIX systems, the software's highlights include a point-and-click forecasting system, a new menu system for conducting market research, and enhancements to the SAS System's quality improvement and project management tools. For research applications, the Orlando release includes a new intuitive interface that front-ends statistical and graphical techniques for determining consumers' preferences and choices. With the interface, researchers can more easily estimate market share, identify important product features and determine new markets. The SAS System will be licensed on an annual basis, with fees determined by the number of workunits supported and

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# Research Calendar

### MODELING AND SEGMENTATION SEMINARS

Group 1 Software, a Lanham, Md., provider of software for mailing efficiency, database marketing, database publishing and customer information management, has announced a series of free seminars on modeling and segmentation techniques and their use in increasing the effectiveness of marketing programs. The seminars introduce modeling and clustering/segmentation analysis and address the role of each in the development of marketing activities. Seminar topics include setting response expectations; positioning a model for results; and gathering and using data, including sales histories, demographic and psychographic overlays and in-house response files. The three-hour seminars will be designed to help participants avoid the "bad data trap," interpret results, determine if and when to model and measure the performance of a model. The seminars will be conducted by Anthony Agresta, Group 1's director of database marketing products. Dates and locations are as follows:

Washington, D.C.—Jan. 17, 9 a.m.-noon
Atlanta—Jan. 18, 9-noon
Ft. Lauderdale, Fla.—Jan. 19, 9-noon
Chicago—Jan. 30, 9-noon
Minneapolis—Jan. 31, 9-noon
Toronto—Feb. 1, 9-noon
Philadelphia—Feb. 7, 9-noon
Saddlebrook, N.J.—Feb. 8, 9-noon
Boston—Feb. 9, 9-noon
Detroit—Feb. 13, 9-noon
Kansas City, Mo.—Feb. 14, 9-noon
Austin, Texas—Feb. 15, 9-noon

For more information or to register call Lisa Wilson at 800-859-4133.

### FEBRUARY SEMINAR ON AGING

University of Massachusetts marketing professor Charles Schewe will present a two-day seminar titled "Marketing to an Aging Population," Feb. 8-9 at the Sheraton Hotel in Framingham, Mass. The seminar will cover topics such as: a portrait of the aging marketplace, key values related to aging, physiological changes that accompany aging, cohort-related values that shape today's and tomorrow's older marketplace, and roles and life stages that consumers move through. The registration deadline is Jan. 25. To register call Heather Miller at 413-545-4195.

# Refining service

## Mystery shopping

# *Mystery shopping fuels Texaco's employee excellence program*

By Lisa Heutel

*Editor's note: Lisa Heutel is a freelance writer based in St. Louis, Mo.*

Gasoline companies claim that a high-octane blend will put more giddyap in your Mustang, but for most drivers, gas is gas. When your tank is running low, unless a price war is raging between local service stations, you're likely to frequent the place where the cashier is friendly and the attendant is happy to help you check the air pressure in your tires.

To make sure its employees are doing their best to draw customers to its stations, Texaco two years ago introduced an excellence program called Building Tomorrow Together that uses mystery shopping to evaluate each of Texaco's wholesale and retail gas stations and truck stops.

In the past, some employees of firms using mystery shopping have seen it as a way for the company to spy on them or punish them for unsatisfactory performance. But companies have learned that for mystery shopping to be effective, it can't be seen as an extension of Big Brother. Rather, as in the case of Texaco, it should be tied to incentive programs that reward employees for superior performance and create a team-like atmosphere.

In the Building Tomorrow Together program, the evaluation process is used as a positive tool for improving the satisfaction of visitors to its 14,000 U.S. Texaco locations. All station managers, truck stop owner-operators and employees are eligible to earn recognition awards based heavily on the evaluations of mystery shoppers.

***"We see image and customer satisfaction as the two most important aspects of building our business," says Dale Northup, Texaco's manager of resale marketing, "and so far, we've seen improvement in these critical areas after completing the first two years of the Building Tomorrow Together program."***


To conduct the mystery shops, Texaco has partnered with Maritz Marketing Research Inc., a wholly owned subsidiary of Maritz Inc., St. Louis, Mo. The criteria used to evaluate each location were developed by Texaco as the standards for its business. Points for image and customer satisfaction make up the bulk of the possible score each location can earn. "We see image and customer satisfaction as the two most important aspects of building our business," says Dale Northup, Texaco's manager of resale marketing, "and so far, we've seen improvement in these critical areas after completing the first two years of the Building Tomorrow Together program."

"These areas are targeted by our research because in an industry where most other aspects, such as the product, are equal, image and customer satisfaction can often distinguish one company from another in the eyes of the customer," says Jeff Amato, the Texaco national account director for Maritz Performance Improvement Co., another Maritz Inc. subsidiary.

Image and customer satisfaction are not the only areas that have shown marked improvement since the program began. "Our program results have shown a direct correlation between image/customer satisfaction scores and total annual gasoline sales volume," says Northup.

**Image enhancement**

Maritz and Texaco have taken things a step further in some regions. Included in the program is a step-by-step image enhancement process designed to improve the appearance of retail facilities that need special assistance in attaining their overall goals. Any location scoring 65 percent or below in the image category of their evaluation is flagged, and the owner-operator, marketing consultant-supervisor and Texaco headquarters are notified. The consultant-supervisor then meets with the owner-operator to discuss specific improvements for the location. After 120 days, both the consultant-supervisor and the owner-operator visit the location again to evaluate the improvements. The process has been so successful it will be expanded to all Texaco loca-

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# Mystery shopping for the financial services industry – then and now

By Barry Leeds

*Editor's note: Barry Leeds is president of Barry Leeds & Associates, a New York research and consulting firm.*

Marketing, and especially marketing research, has been late in coming to the financial industry. Of all the types of market research, mystery shopping was the first to be accepted by the banking fraternity. Why? Because it was easily understood by management. It communicated to management what happened (play-by-play) when a customer or prospective customer entered a branch to open an account, inquire about a service or conduct a teller transaction.

Mystery shopping is also an instant replay of what happened when a customer or prospective customer interacted with a branch employee. In the past, when presenting shopping program results, researchers did not worry about sample size, demographics, regression analysis, statistical modeling. All they had to do was paint a picture of what happened when a customer visited a branch. Because of its vivid depictions of particular behaviors or events the mystery shopping program prompted changes — as was its goal.

**A brief history**

Mystery shopping in banking has evolved over the years. It is still one of the most often used research techniques while also being one of the most expensive ways to collect primary data about a customer/employee interaction.

In the 1970s, mystery shopping really caught on. During that decade, approximately 25 percent to 35 percent of all banks with over $300 million in deposits conducted some type of mystery shopping program. Most often it was a benchmark program with a one- or two-year follow-up. When mystery shopper programs were used in this manner, it was frequently difficult to note changes either for the better or worse because there were no motivational programs in place to encourage change. It was difficult to determine what caused changes that did occur.

What prompted the growing interest in mystery shopping in the '70s was the realization by bankers of the importance of developing a sales culture. And because sales professionalism became increasingly important, a device had to be developed to monitor sales skills, as well as changes in service behaviors in the sales culture. Mystery shopping began to be used as a monitoring device for sales culture development, specifically for tracking sales behaviors and skills.

This phenomenon then led to the use of mystery shopping to not only monitor but to motivate performance, set goals or standards and reward performance. Some of the more progressive and sales-oriented banks began rewarding employees based upon the performance of sales behaviors as well as sales successes.

In the '80s, the industry's new catch-all phrase was "service quality" and, once again, mystery shopping (along with consumer and customer satisfaction surveys) became the industry's standard for evaluating, monitoring and motivating performance. It was the combination of these two research methodologies that changed the basic mystery shopping methodology to one of a predictor of customer satisfaction. By determining customers' wants and needs and what satisfies customers most, checking for and reinforcing specific behaviors can be built into the mystery shopper program.

It has been proven that as the sales professionalism and service behaviors improve, so does customer satisfaction. The first step in this dual methodology is to determine what specific sales/service behaviors impress customers most. The next step is to translate these behaviors into branch employee procedures, and the final step is to monitor those procedures. So rather than ask shoppers (as researchers have in the past) "Was your branch experience pleasant?" or "Was the customer service representative pleasant?" now researchers ask shoppers if the customer service representative showed specific sales/service behaviors or took specific actions such as standing and greeting the customer, asking meaningful questions and offering to follow-up with the customer. When a bank's staff does these things, customers receive a warm, friendly, caring type of professionalism and perceive that the bank really cares about their business. This in turn helps encourage (and increase) new account deposits and fosters customer satisfac-

***In the past, when presenting shopping program results, researchers did not worry about sample size, demographics, regression analysis, statistical modeling. All they had to do was paint a picture of what happened when a customer visited a branch. Because of its vivid depictions of particular behaviors or events the mystery shopping program prompted changes – as was its goal.***

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# Vexed by significance testing? Try the bootstrap technique

By William S. Farrell

*Editor's note: William S. Farrell, Ph.D., is director of marketing at Sociometrics Corp. in Los Altos, Calif.*

I teach market research as well as conduct it, and when I come to the part of the course where significance testing enters the picture, it's never clear who is more worried — me or the students. We're worried about the same thing, of course: the difficulty of teaching (learning) the dauntingly complicated theory underlying significance testing. There are problems even when I try to avoid most of the theory — normal distribution, central limit theorem, etc. — and go with a "cookbook" approach.

I usually have my students analyze data using a spreadsheet package such as Excel, since few of them have access to a statistical package. As soon as they try to run their first t-test, however, they are forced to make decisions about "homoscedastic" vs. "heteroscedastic," among other things. And even if they are fortunate enough to have access to a true statistical package like SPSS, they don't know which of two p values to use for the t-test until they understand something about "Levene's F test for equality of variances."

Is it any wonder that my students react to statistics the way they react to Freddy Krueger? Fortunately, help is on the way (for practitioners as well as students), in the form of something known as the bootstrap technique.

I'll introduce it by way of an example. Let's say we're rolling a pair of dice (you didn't think you'd get through a statistics article without reading about dice, did you?) and we're curious about how often a seven will show up. We could answer the question using the formula for the binomial expansion — if we remembered the formula for the binomial expansion — or we could do it another way.

First, we'd count how many ways there are to roll a seven: 1-6, 2-5, 3-4, 4-3, 5-2, 6-1 — six ways in all. Then we'd count the total number of ways two dice could come up: 1-1, 1-2, 1-3, etc. I'll spare you the list — there are 36 ways altogether.

So there's our answer: we simply divide six (ways to get a seven) by 36 (total combinations) and find that a seven should come up about 17 percent of the time, on average. You can bet on it.

How does this relate to significance testing? Let's look at a hypothetical example more directly relevant to market research. Say you've just conducted your annual customer satisfaction survey and you find that customers in the Northeast give you a 9.2 rating on a 10-point scale, while customers in the South give you an 8.5 rating. You'd like to know if the difference of 0.7 is statistically significant.

One (good) way of re-stating your question is as follows: if chance factors alone were at work, how often would you get a difference as large as 0.7 between the means for these two groups of customers? That question can be answered using a traditional t-test, or we could apply the bootstrap method in a way that's analogous to what we just did with the dice. Theoretically, we'd list all possible ways your customers could have responded, then we'd calculate the proportion of those in which the difference between sample means was equal to or greater than 0.7.

Practically, we'd do something like this: let's say you have responses from 93 customers in the Northeast and 58 customers in the South. We'd put all 151 numbers into a pot; draw a sample of 93 with replacement and calculate the mean; draw a sample of 58 with replacement and

calculate that mean; calculate the difference between the two means; and then store that difference. This process would be repeated perhaps a thousand times. When we were done, we'd calculate the proportion of differences that equaled or exceeded 0.7.

Though you may find this difficult to accept at first (I certainly did), that proportion is conceptually the same as the p value one could calculate in Excel or SPSS, and is in fact a more valid answer to the question of whether the two groups differ.

The bootstrap p value and the traditional p value are conceptually identical because they both tell us the following: If we repeated the customer satisfaction study many times, and there were no difference between the two populations, we would observe a sample difference of 0.7 or greater exactly p percent of the time.

The bootstrap value is more valid than the traditional p value because it doesn't depend on a major assumption underlying traditional significance testing; namely, that the distribution of what we're measuring is normal in the population (or alternatively, that we have a large enough sample so that the sampling distribution of the mean is normal).

***The technique can be applied to data at all levels of measurement: nominal (categorical), ordinal (ranking), interval and ratio. It can be used to assess significance (p values) and to compute confidence intervals. The technique is not a new one, but it is becoming newly accessible to the vast majority of market researchers whose computing resources lie somewhere between a calculator and a Cray.***

Alert readers will have noticed that in our hypothetical application of the bootstrap, we looked at only 1,000 shuffles of the customer data, not all possible combinations as we did with the dice. Is this kosher? It is, but the details would take us too far afield. Suffice it to say that in most implementations of the bootstrap, 1,000 to 3,000 iterations (depending on the specific problem) have been shown to produce extremely accurate p values.

Does the bootstrap work in the "real world" of market research? You can bet on it. I recently asked a national sample of physicians to rate, on a 10-point scale, the importance of 25 attributes of a medical device. I wanted to compare the ratings of two subgroups of physicians, to see if one group viewed any of the attributes as differentially important.

One group was much smaller than the other — 47 vs. 131. Despite this difference in sample sizes, SPSS told me that sample variances were equal for the two groups on 22 of the 25 attributes (remember Levene's F test?). For those 22 attributes, the two-tailed p value computed using a bootstrap p procedure differed by no more than .006 from the p value calculated by SPSS in a traditional t test. This was reassuring.

For the three attributes where SPSS said the groups had different variances, things got interesting. Differences for two of these attributes were deemed non-significant, both by SPSS and by the bootstrap. For the third attribute, SPSS computed a p value of .049, a value that meets the "standard" criterion for statistical significance. The bootstrap procedure computed a p value of .12 for this attribute — not even close to significant by most people's standards. Which one did I believe? I think you can guess.

The real question is why this technique is only now coming into widespread use, and the answer has a lot to do with computer power. Typical bootstrap significance tests that might take one to five minutes to solve on a fast 486 today would have required hours on a fast 286 a decade ago.

You might be wondering why this technique, first described in 1979 by Stanford statistician Bradley Efron, is called the bootstrap. The term is a whimsical reference to the fictional Baron von Munchausen, who is said to have avoided drowning by pulling himself up by his bootstraps from the bottom of a lake. It reflects the notion that analysis is performed without the help of outside agencies, such as the normal distribution.

The bootstrap has been implemented under a variety of descriptive rubrics, including distribution-free statistics, resampling statistics, exact inference testing and permutation statistics. They all have in common the notion of repeated sampling from the original data, calculation of a statistic with each sampling, and then inspection of the resulting distribution of that statistic.

The technique can be applied to data at all levels of measurement: nominal (categorical), ordinal (ranking), interval and ratio. It can be used to assess significance (p values) and to compute confidence intervals. The technique is not a new one, but it is becoming newly accessible to the vast majority of market researchers whose computing resources lie somewhere between a calculator and a Cray.

And compared to teaching the normal curve, central limit theorem, etc., I find it much easier to convey what boils down to a three-step process: (1) What's our result? (2) What are all the different results that could have occurred? (3) How many of the possible results equal or exceed ours?

I believe this paradigm will transform the way statistical analysis is taught and conducted. Stay tuned. ❑

# War stories:

## True life tales in marketing research

**By Art Shulman**

*Editor's note: "War stories" is a regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. Readers are invited to call (818-782-4252) or fax (818-782-3014) Shulman with stories of their own.*

While consulting statistical abstracts to obtain some figures about the composition of the U.S. population, I uncovered an interesting fact. According to the U.S. Bureau of the Census, in 1993 there were 56.8 million married men in the U.S., slightly fewer than the 57.7 million married women. Must be all the polygamists in Utah!

David Weiss of the National Decorating Products Association reports a mail survey he conducted where consumers were asked to indicate the most recent room where they used paint or a coating like varnish or sealer. Most consumers wrote in the conventional "living room" or "den" or "deck." One macabre respondent, however, wrote in "casket."

Sometimes in market research, death can be fun. Dick Kurtz of CMR Market Research reports that early in his career he went out to conduct door-to-door interviews in a poor rural area in the outskirts of Charlotte, N.C. He knocked on the door of a ramshackle house on a street with no name and was informed that the inhabitants had just returned from a funeral. Kurtz was about to apologize for intruding when one of the family members indicated that not only would the woman do the interview but they wanted him to stay for the "party." Kurtz says the food and music were great.

Kurtz also cites another door-to-door study where he went to great lengths to get an interview. At one house, a woman agreed to do the interview on the condition that Kurtz pretend to be her husband to fool a pesky salesman. It seems the salesman had talked her into buying a vacuum cleaner the prior day and was scheduled to arrive shortly to collect the check.

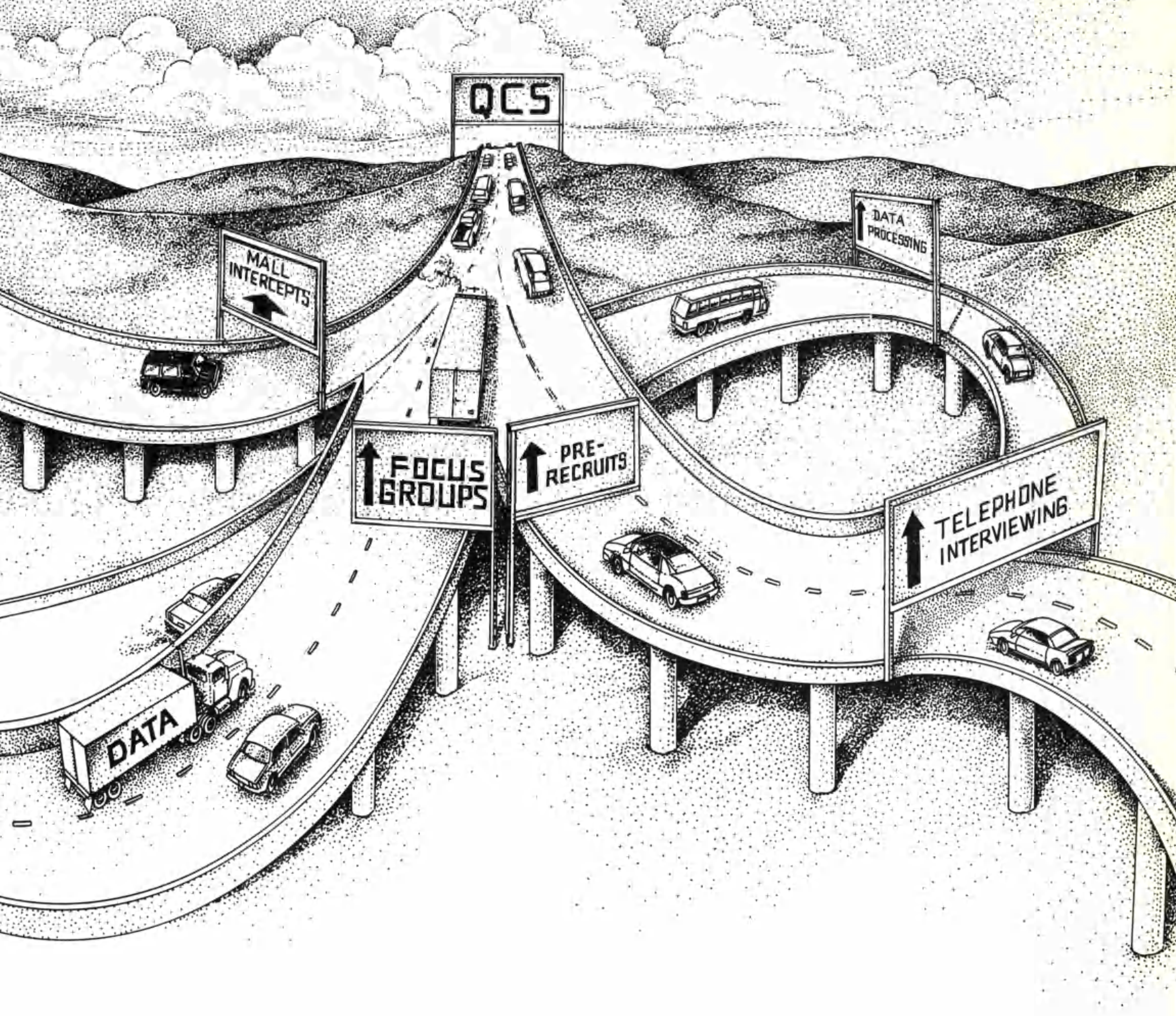
Sure enough, the salesman soon showed up and Kurtz, then a naive young researcher, convinced the salesman that "his wife" had been high-pressured to buy the overpriced vacuum cleaner and didn't want it. Kurtz refused the salesman's offer of a personal demonstration of the vacuum cleaner, and felt that he did his part to improve the image of market researchers and their ability to serve consumers. Afterwards, Kurtz collected his hard-earned reward — he completed the interview.

Sherry Haub of Bernstein-Rein Advertising cites a focus group on roach traps she conducted early in her career. The session was held in one of the loveliest rooms she ever moderated in, with plants everywhere and a large skylight highlighting a big round marble table. The table featured a plateful of elegant goodies for respondents to snack on, surrounded by a dozen of the client's roach traps, the intended subject of discussion.

The group was progressing nicely when suddenly all faces in the room registered surprise, then puzzlement, then dawning consternation as they noticed the Madagascar-sized roach perched insolently on the edge of the goodies plate, safe amid the armada of roach traps it had so casually negotiated on its way to the snacks.

A story in a prior War Stories column relating to women in focus groups adjusting their underwear in front of the one-way mirror inspired public relations consultant Bob Schechter to relate some of his experiences while at Bali Bras, a division of Hanes. In one study, a woman kept complaining about the buckles in her bra. When the moderator asked why, the woman informed the moderator that she was the Texas trap and skeet shooting champion, and when she shot 300 times a day the buckle bit into her shoulder. The moderator wondered how projectable that respondent was to the general population.

Schechter also described a bra focus group where an older, overweight woman brought her fellow respondents to tears by describing to the young women in the group how her long-time husband still regularly bought her sexy lingerie and told her how desirable she was and how much he was still in love with her.


QCS
MALL INTERCEPTS
DATA PROCESSING
FOCUS GROUPS
PRE-RECRUITS
TELEPHONE INTERVIEWING
DATA

# Names of Note

**Audrey Palosaari** has returned to *C.J. Olson Market Research, Inc.*, Minneapolis, as an account executive. She was the firm's vice president of interviewing from 1984 to 1987 before taking a sabbatical.

**Kathy Nelson** has been hired as a director in the Creative Services Group of *Conway/Milliken & Associates*, Chicago.

**Simon Chadwick** has relinquished his position as chief executive of *Research International USA*, New York, in order to devote full time to *Winona Research*, Phoenix. Both companies are members of WPP Group, London.

**Jim Martel** has joined the Agricultural Division of *Maritz Marketing Research Inc.*, St. Louis, as an account manager. **Dave Dixon** has joined the firm's Systems and Research Services Group as research manager. **Linda LaGarce** has joined the St. Louis office of the firm's Performance Measurement Group as an account manager. **Dr. James Stone** has been promoted to director of European research. In his new position, he will head up Maritz Research, a marketing research division of Maritz Europa located in Marlow, England. **Gary Eversole** has been promoted to vice president, director GM Customer Satisfaction Center for Maritz's Automotive Research Group in Toledo, Ohio.

**Patricia Saporito**, president of *Saporito & Associates, Inc.*, a New York research firm specializing in insurance and related industries, has been elected president of the Society of Insurance Research for the 1996 term. She holds CPCU (Chartered Property and Casualty Underwriter) and CSA (Certified Systems Analyst) designations.

**Saporito** **Balden**

**Wally Balden** has been promoted to vice president at the Arlington Heights, Ill., headquarters of *Market Facts, Inc.*

**Rita Kite** has been promoted to director of telephone interviewing at *Response Analysis*, Princeton, N.J. **Scott Keshanech** has joined the firm's sampling department as statistician.

*Simmons Market Research Bureau, Inc.*, New York, has appointed **Lindsey Draves** as associate technical director. In this newly created position, Draves will work with Gregg Lindner, technical director, on design and execution of the company's syndicated surveys.

**Barbara R. Caplan** has rejoined *Yankelovich Partners, Inc.*, Norwalk, Conn., as a partner.

# Research Company News

Alan R. McClure has sold his interest in **Decision Insight**, a Kansas City, Mo., research firm, to founder Betsy Stewart. McClure plans to open a dude ranch near Kansas City.

**Direct Feedback**, a research firm with offices in Pittsburgh and San Diego, recently consolidated with two business units: Distribution Solutions, a San Diego telemarketing and fulfillment firm, and Advanced Interface Services, a Cincinnati teleservices company. Direct Feedback's parent company, Advanced Access, will continue to provide marketing research services through Direct Feedback while increasing its capabilities to include other telemarketing and direct mail services. For more information call Tara Hill Conroy at 412-394-3650.

**Mediamark Research Inc.** (MRI), New York, and **LHK Partners, Inc.**, Newtown Square, Pa., have formed **STAHLHEBER**, a joint venture to conduct data collection for MRI's ongoing, national survey of media and product usage. The venture was named to honor the late Bob Stahlheber, founder (in 1986) and director of MRI's Custom Research Division until his death in 1992.

**Southern Research Group**, Jackson, Miss., recently completed a significant expansion of its call center facility, doubling its capacity for collecting marketing research. The expansion added square footage, upgraded computer hardware and software and converted the phone system from a key system to digital. Eighteen work stations were added, for a total of 36. All are automated by the Sawtooth Ci3 CATI system and networked by Novell Netware. For more information call Dan Davis at 800-777-0736.

**The Dohring Co., Inc.**, Glendale, Calif., will be a supplier of market research services, including on-site polling, to the 1996 Olympic Games in Atlanta. During the games the company will conduct on-site polling for the United States Olympic Committee using its TRENDTRAK electronic device.

**Customer Insight Co.**, Englewood, Colo., has signed an exclusive corporate reseller agreement with **Corporate Strategies International**, Melbourne, Australia, to market Customer Insight's AnalytiX database marketing system in Australia and New Zealand.

**Audits & Surveys Worldwide, Inc.** (ASW), New York, has formed a new division, Audits & Surveys Latin America and entered into a strategic business relationship with ASECOM, S.A., a marketing research firm based in Buenos Aires, Argentina. ASECOM will work with the new division on ASW's studies in Argentina, represent ASW in selected multi-national studies in Latin America and together develop multinational business opportunities in that area. For more information call 212-627-9700.

**Pathfinder Research Group**, Acton, Mass., recently celebrated its tenth anniversary.

**Urban Decision Systems** (UDS) has signed a joint-marketing agreement with **Decisionmark Corp.** Under the agreement, UDS's demographic marketing and business information databases will be available through Decisionmark's recently-launched desktop software package, Proximity. For more information call 319-365-5597.

# How to ensure an objective mystery shop

By Dan Prince

*Editor's note: Dan Prince is founder and president of Prince Market Research, Nashville, Tenn., a specialist in mystery shopping and customer satisfaction surveying.*

A mystery shopping program will sooner or later grind to a halt if managers and employees claim the program is not objective. Conversely, if the shops are perceived as being fair and unbiased, then you gain employee buy-in and a much greater chance of instilling desirable behavior by your frontline staff.

Starting with a single banking client, we implemented our first mystery shopping program seven years ago. Since then, we have served additional clients in financial services, retail, and health care. While a portion of our mystery shops are performed in-person in several different states, a growing number are now being done over the telephone.

Out of the experience of serving these companies — each of whom demands accurate, objective information from us — we have developed several practices and guidelines which may be useful to you.

To ensure an objective mystery shop — and a credible mystery shopping program — our experience suggests that you must:

• design a scoring sheet that promotes objectivity;

• screen potential mystery shoppers carefully;

• try them out (on a competitor);

• review each completed scoring sheet in detail; and

• be prepared to replace suspect shops with a re-shop.

1. *Design a scoring sheet that promotes objectivity.*

While this may not seem to be the obvious first step, it is. In fact, we have found that is the most critical step. If you don't design a scoring sheet that allows for objective grading of an employee's performance, then you leave yourself open to wide interpretation of what constitutes acceptable behavior by employees.

Mystery shopping is built on the assumption that your client (or your company's senior management) knows and can articulate a set of behaviors that, when delivered with sincerity, constitute a positive, productive interaction with a customer. It's what sometimes called a "service script."

At the beginning of a new shopping program, we work with our clients to write out the statements of desirable behaviors which constitute the company's service standards. It's very important to be sure that these written standards have buy-in from relevant senior managers—before further developing a shopping program.

For example, in a retail banking environment, management may decide that a customer service representative needs to do each of the following things at the beginning of an interaction with a customer:

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## Financial mystery shops

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tion. Here are several examples of how to use mystery shopping to increase sales and improve service.

**Increase sales and improve service**

Mystery shopping can help motivate and reward the front line for encouraging applications, developing rapport with the customers, asking questions and making available appropriate products. A variety of products can be evaluated using mystery shopping, ranging from loan and deposit products to investments and non-deposit products. Measurements should be taken quarterly to provide timely feedback on missed opportunities (for example, not asking the customer to come back or forgetting to offer an application). It will also enable frequent communications with frontline personnel, heighten the importance of sales and service, and provide for performance incentives.

Service affects sales, customer satisfaction and ultimately customer loyalty, and that affects the bank's bottom line. Mystery shopping improves how the universe of consumers (purchasers and non-purchasers) are treated by your staff, customer service representatives, tellers and telephone service representatives. It tells you whether the front line is treating consumers consistently and in a manner that adheres to your standards. More specifically mystery shopping measures whether your staff is knowledgeable, efficient, helpful and courteous. Conducted on a continuous basis, mystery shopping can motivate and recognize service performance.

Used as a benchmark, mystery shopping can pinpoint strengths and weaknesses for training operations and policy refinements. A benchmark can also reveal how you measure up against the competition. In addition, it can identify the competition's best and worst practices and present you with opportunities to improve. In the end, mystery shopping helps build customer satisfaction, deeper product usage and higher customer retention, which spells increased profits.

Once again, a variety of products and scenarios should be included in the program. Monitoring how both customers and non-customers are treated when cashing or depositing a check, inquiring about overdraft protection or a money market account and conducting transactions over the telephone are just a few of the scenarios that can be used.

The 1990s have called for a much more prominent role for mystery shopping. Some might even call it the decade for "undercover testing." The 1990s have also brought more demanding, diverse and information-hungry consumers who learn quickly and react quickly — especially when misled. To satisfy consumers' need for information, companies rely on trained personnel and publications to communicate with consumers. Consumers in turn cruise the information highway by calling or visiting financial institutions, subscribing to industry specific magazines and even searching for information by computer. Some information providers (such as *Money* magazine and *Consumer Reports*) shop bank branches to report to consumers how banks and brokerage firms are doing.

New and emerging consumer markets are also making new demands on banks. For example, the purchasing power of women and minorities has increased and their voices are being heard at your institution — and in Washington. Also, the regulators responding to "market focus" want to make sure banks and mortgage companies are not misleading consumers and are making suitable products available to all members of the community. Mystery shopping can provide concrete information about the perceptions these consumer groups have of your bank, which in turn can help you capture new markets and comply with regulations.

**Proactive about compliance**

This brings us to the areas of compliance and proper management oversight. Banks must assure themselves, regulatory agencies, customers and stockholders that they are in compliance with the law. The worst thing that can happen to a bank is to have the lead story in the local newspaper talk about a Department of Justice investigation at their institution.

Mystery shopping has evolved so considerably that it is now being recommended to all banks by all of the federal regulatory and enforcement agencies: Office of the Comptroller of the Currency (OCC), Federal Reserve, Federal Deposit Insurance Corp. (FDIC), Office of Thrift Supervision (OTS), Department of Justice (DOJ) and Housing and Urban Development (HUD).

It is viewed as so important that federal agencies are conducting their own shopping programs and the Department of Justice has included shopping (called "testing" by government agencies) in its settlement decrees with Decatur Federal, Shawmut, Vicksburg, Chevy Chase and Northern Trust.

**Fair lending and community reinvestment**

Even when used for compliance, the technique's ability to help improve sales and service rings true. By asking the necessary questions to determine whether the bank is in compliance, you can also learn how well your employees are providing service.

The Equal Credit Opportunity Act (ECOA), its implementation through Regulation B, and the Fair Housing Act (FHA) prohibit discrimination in lending. The ECOA specifically prohibits statements (both oral and written) that discourage, on a prohibited basis, a "reasonable person" from asking for or completing an application for credit. Because the ECOA specifically prohibits oral or written statements that discourage applications for credit, a bank must guard against actions that may be construed as prescreening when consumers shop for credit.

Mystery shopping, in the form of matched pair testing, presents an appropriate vehicle for helping banks comply with the law. For example, matched pair testing in the pre-application stage of a mortgage loan can help lenders monitor whether they are providing minorities and non-minorities with equal access to credit.

Two shoppers (for example, one African-American and one non-minority) separately visit or call a bank and inquire about a mortgage loan for a home they wish to purchase. The shoppers simulate an actual customer inquiry and are furnished with very similar marginally qualifying financial profiles (incomes, outstanding credit, marital status, down payment, savings and so forth). The shoppers record their observations and impressions on a questionnaire immediately after the visit. Their observations and impressions are aggregated and side-by-side comparisons are made. The comparisons are made to determine whether the shoppers were treated differently.

If differences are found or possible Regulation B violations are noted, reshopping should be conducted. The shops help verify whether the findings are reflective of a pattern or practice of possible violations of the ECOA or FHA.

**Mutual funds and nondeposit investment products**

The guidelines issued by the four regulatory agencies (OCC, Federal Reserve Board, OTS and FDIC) specifically recommend a series of steps (inclusive of oral and written disclosures) aimed at ensuring that customers purchasing nondeposit investment products have a clear understanding of the nature of the products and the fact that they are not insured by the FDIC. The interagency guidelines recommended the following disclosures when selling or advising consumers about nondeposit investment products: (1) the fact that nondeposit investment products are not insured by the FDIC; (2) nondeposit investment products are subject to risk and possible loss of the principal amount invested in these products and are neither deposits or other obligations of the institution nor guaranteed by the institution. The interagency guidelines also hold that advertisements and brochures should clearly and conspicuously state these disclosures.

Banks involved in the sale of nondeposit investment products are also required to follow the rules of the National Association of Securities Dealers (NASD), as set forth in "Fair Sales Practices," and of the OCC in Bulletin 94-13. A bank salesperson must ask sufficient needs-based questions (about income, financial and tax status, ownership, risk tolerance, goals, liquidity) to be able to recommend suitable products.

Mystery shopping in the form of nondeposit investment product testing reveals whether a bank is providing an environment aimed at fostering a clear understanding of investment products and limiting customer confusion about the lack of federal deposit insurance coverage and the role of the institution in the sale of these products. The results of the individual tests are then aggregated and analyzed. A "reasonable person's" approach is used to reach a determination of whether the institution's nondeposit investment product sales and service practices follow the federal interagency guidelines and the NASD's fair sales practice rules.

The 1990's are interesting times for banks, and mystery shopping will continue to help banks do a better job in serving customer needs. It will help to maintain or even improve sales and service when institutions are downsizing their staff. It will help companies reinforce the importance of service in the minds of employees. And it will help provide adequate management oversight of the behavior and sales practices of its employees. ❑

## Survey Monitor
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"A complaint is a wonderful opportunity for the retailer," Watson continues. "For every complaint you get, maybe a half dozen others will not take the time. So the first thing you need to do is to go to those customers and thank them sincerely. They are taking the time." Complaints, says Watson, are "a phenomenal source of information" on what is going wrong in a store's operation, especially if they are coming from frequent shoppers.

Overall, the Burke CSA department store customer study found a very high level of satisfaction, with nine out of 10 of those surveyed reporting themselves as very or somewhat satisfied, and that they would shop at that store again. However within this overall positive rating, the Burke survey revealed an age split between those shoppers willing to complain and those who would fume but suffer silently. Complainers are likely to be older. Separated by age, 61 percent of those 55+ said they would definitely speak up while only 39 percent of those under 34 said they would. Thus an older, more frequent shopper is more likely to turn up at the complaints window and yet this is the same customer who most expects to come away satisfied.

The "complainer" profile fits closely with Burke's findings of a department store "secure customer," which Burke CSA defines as one who is very satisfied, would definitely recommend the store to others and would shop at that store again. Any other customer is considered vulnerable. This study revealed a department store secure customer tended to be a female 45+ who shops one or more times a month. Statistically, Burke's most vulnerable department store customer is under 34 and an infrequent shopper. For more information call 513-684-7659.

## Tracking study looks at perceptions of multimedia/interactive technologies

The latest edition of the Verity Multimedia/Interactive Tracking Study by The Verity Group, Inc., Fullerton, Calif., has been released to subscribers. The biannual study focuses on the attitudes, behaviors and/or opinions of adult consumers, children and retailers in relation to different technologies. On-line services, CD-ROM, and "edutainment" are three of the 20 topics researched.

The biannual study focuses on the attitudes, behaviors and/or opinions of adults, children and retailers in relation to a wide variety of existing and emerging multimedia/interactive technologies.

One of the study's highlights is the "brand mapping" section in which consumers compare the attributes of 20 brands — some of which haven't been considered competitors until now. "Thanks to the phenomenon of 'convergence,' products that used to be in distinctly different categories are now competitors. As the line blurs between personal computers and compact disc players, a company like Sony might find itself competing against a company like Compaq. This is just one of many cases where individual products are merging into a new hybrid product," says William Matthies, Verity's president.

The last study, released earlier this year, provided profiles of five distinct attitudinal segments. One group, dubbed "The Beaten Path" by Verity analysts, wants nothing to do with multimedia/interactive products, and in fact believes they are a bad idea and unnecessary. "The market for new technology is not dependent on demographics alone. We find that younger consumers are not universally receptive to new ideas and emerging technology," says Grace Post, Verity's vice president of market research.

Some study highlights:

• 62 percent of adults say they will watch a maximum of 10 TV channels no matter how many are offered in the future.

• 68 percent of adults are aware of the term "multimedia" compared to 51 percent who are aware of "interactive." Fifty-nine percent of consumers believe there is a difference between the two technologies.

• Adult consumers believe that the phone company could provide higher quality interactive TV than could cable companies. Forty-four percent of adults say they would seriously consider receiving TV service from the phone company rather than their cable company. Fifty-three percent would rather have DBS than cable.

• 78 percent of adults believe that the convergence of PCs with entertainment-type products is a good idea.

• 70 percent of adults see the need to combine products that are currently sold separately. Sixty percent do not believe that combined products mean lower quality.

• 61 percent of retailers agree that multimedia should combine the functions of products which are currently separate.

Consumers and retailers more often use the television, rather than the computer, as the base or focal point for a converged product. Whereas computers and CD-ROM are most frequently associated with the terms "multimedia" and "interactive," this may not be the case where product convergence is concerned.

• 22 percent of adults subscribe to an on-line service. Twenty-five percent of them say they have canceled one service and subscribed to another sometime in the past. Fifty-two percent of adult on-line subscribers use the service at least two to four times per week; 68 percent use it once a week.

• Adult subscribers use E-mail (28 percent), use Web info pages (15 percent) and download information (14 percent).

• 44 percent of children who subscribe to on-line services say their parents limit their use; 48 percent say they are allowed to go on-line for one hour or less at a time; 41 percent are allowed one to two hours at a time.

• To date, children own about 10 times more cartridge games than CD-ROM games.

• 38 percent of adults who play games on PCs anticipate playing more frequently with Windows 95.

• 44 percent of children say a computer is the ideal game platform, while 40 percent say it is a TV-based system.

• 47 percent of the children who owned a standalone game system before their household got a computer say they now play games more frequently on the computer than on the standalone system.

The ideal game system should include the performance and graphics offered by PC-based video games and the screen size offered by standalone systems which connect to the television.

• 40 percent of adults say they use their home PC everyday.

• 48 percent of adult home computer owners say they bought their computer to complete work from the office. This compares to 17 percent who purchased for games and 16 percent who purchased for the kids.

• 33 percent of adults who purchased edutainment software for their children say their child told them which title to purchase; 27 percent of those children used that title at school.

• 71 percent of adult home computer owners say software came bundled with their computer. Fifty percent of computer owners say they do not regularly use the software that was bundled with their computer. They also say they wished different software had been bundled (28 percent of 71 percent) and that proper software bundling is important enough to affect the computer brand purchased.

Bundling is a key factor in a

consumer's mind when purchasing a computer. However, there does appear to be conflict within the household when children are involved. Children would like to find more game software bundled with computers while adult consumers are more likely to mention desiring various word processing and business related software.

- 41 percent of adult consumers believe that on-line product advertising/information will be very influential in introducing multimedia/interactive products and in convincing consumers to buy them.
- 53 percent of adults strongly agree that in-store demonstrations will increase their likelihood of purchasing a multimedia/interactive product.

The sampler disc has become the norm for marketing software. Actual hands-on experience appears to be the factor that propels consumers to purchase new products, especially those that incorporate multimedia or interactive technology.

- 48 percent of adults claim they would like to have the ability to check a store's stock via the computer, then go to the store to purchase the desired item.
- Nearly 40 percent of retailers believe it is likely that new stores will open in the near future which will sell multimedia/interactive products only. Thirty-four percent of consumers say they desire a new store which sells only "converged" products. For existing stores, dealers feel that superstores will be the winners in multimedia/interactive product sales.

The latest study is based on interviews with 1,000 adults aged 19 and older, 600 children from eight to 18 years of age, and 500 retailers divided between major chains and independent dealers. Research methodology is selected to be representative of the total U.S. population and is accurate to ± 3 percent. For information call Grace Post at 714-680-9611 ext. 202.

## Shoppers wary of efforts to monitor their behavior

A recent study found that many consumers would be willing to provide information on their shopping habits for the purpose of receiving targeted promotions, provided they receive a full disclosure and assurances that the information will only be used for the intended purposes and not sold or provided to others without their approval.

The study, by Clayton/Curtis/Cottrell, a Boulder, Colo., market research firm, presents information based on personal interviews, focus groups and direct mail surveys with 2,529 shoppers randomly selected nationwide.

In spite of their apparent willingness to let marketers monitor their consumption, consumers are wary. There have been too many violations of their privacy. Many concepts that currently gain shopping information, such as loyalty programs, electronic kiosks and shopping behavior questionnaires do not fully disclose to consumers how the information will be used.

Fifty-seven percent of the shoppers surveyed would be bothered to learn that their shopping behavior was being measured and sold without their knowledge; 30.1 percent would not be bothered. Sixty-seven percent of the shoppers surveyed indicate that their store has not fully disclosed how information on their shopping behavior is to be used. Only 4.3 percent of the shoppers indicate that they have received a full disclosure.

Slightly less than 38 percent of the shoppers surveyed would be willing to provide their shopping behavior information if they were satisfied with how it will be used. At the same time, 36.6 percent are not willing to provide behavioral information regardless of the assurances received. The largest group of shoppers, at 23.5 percent, would be willing to provide their shopping information to the grocery store where they do most of their shopping. Another 21.1 percent would be willing to provide it to a highly recognized and respected national company representing all manufacturers of grocery store products.

Only 17.7 percent are not willing to provide their shopping information regardless of the assurances or representations. The remainder, 86.7 percent, are willing to provide their information to certain entities or under certain circumstances.

Thirty-three percent of the shoppers surveyed use a check-cashing card; 40.4 percent completed an application when applying for their check-cashing card; 19.2 percent belong to a frequent shopper club; 14.9 percent completed an application when applying for membership in a frequent shopper club; 13.9 percent pay for their purchases at the grocery store with a national credit card and 71.3 percent pay for their grocery store purchases with a personal check. Slightly less than half (49.0 percent) of the shoppers surveyed realize that most, if not all, of the above activities may allow their shopping behavior to be measured.

The largest group of shoppers, at 45.8 percent, is indifferent about redeeming personalized coupons; 31.3 percent like the concept and 22.9 percent dislike it. The redemption of personalized bank drafts (like coupons, but cleared through the Federal Reserve System instead of through clearinghouses) is disliked by 45.8 percent of the shoppers; 35.4 percent are indifferent and 18.8 percent like the concept. The preparation of a shopping list on a special scannable form is disliked by 45.7 percent of the shoppers if coupons are printed for the products purchased; 29.8 percent like the concept and 24.5 percent are indifferent. If a scannable shopping list results in automatic discounts at the cash register for the product purchased 35.1 percent of the shoppers like the concept, 35.1 percent dislike the concept and 29.8 percent are indifferent.

Just over 65 percent of shoppers dislike the idea of being able to select available promotions from their home television or telephone and have coupons printed out prior to shopping; 24.7 percent are indifferent and 9.7 percent like the concept. Just over 55 percent dislike the idea of being able to input their shopping list into their home television or telephone and have the applicable discounts on purchases automatically deducted at the time of checkout; 31.5 percent are indifferent and 13.0 percent like the idea. Slightly less than half the shoppers surveyed — 48.4 percent — dislike the concept of answering shopping behavior questions on their interactive television or telephone; 34.1 percent are indifferent and 17.6 percent like the idea. Almost half the shoppers surveyed — 49.5 percent — were in favor of a one-time completion of a shopping behavior questionnaire that would result in an ID card that allowed automatic deduction of discounts at the time of checkout; 34.7 percent of the shoppers are indifferent and 15.8 percent dislike the concept.

Testifying to the passion for discounts, 54.2 percent of the shoppers surveyed would disclose their shopping behavior if doing so were the only way to obtain discounts and only 19.8 percent will not provide their identity regardless of the circumstances. If providing their identity entitled the shopper to bonus discounts over and above the regular discounts, 60.4 percent of the shoppers would allow themselves to be identified and their shopping behavior monitored. Only 14.6 percent are unwilling to identify themselves and their shopping behavior.

A free 32-page brochure describing the full study is available upon request. For more information call Bob Cottrell at 303-444-2381.

## Product & Service Update

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number of SAS System components licensed. For more information call 919-677-8000.

## Kit extends MAPTITUDE's capabilities

Caliper Corporation, Newton, Mass., has introduced a new developer's kit that extends the capabilities of its MAPTITUDE software by letting developers create new custom mapping applications. The kit, called the Geographic Information System Developer's Kit (GISDK™), adds a complete programming and application development language to the core product. MAPTITUDE offers mapping and analysis functions, built-in OLE and ODBC support, and an array of data on CD, including all of the streets in the U.S., ZIP Codes, counties, metro areas, demographic statistics and more. With GISDK, developers create add-ins that extend MAPTITUDE's capabilities, or create custom applications with menus and dialog boxes tailored to specific vertical applications. The GISDK also creates server applications so developers can add OLE-embedded maps and spatial analysis capabilities to their own programs. Developers can use almost any programming language to construct the client application, including Visual BASIC, C, C++, or another application's macro language. For more information call 617-527-4700.

## StreetRite 4.2 hits the streets

Group 1 Software, Lanham, Mass., has released StreetRite version 4.2 for PCs. This version integrates with MapInfo Corp.'s MapMarker, providing a method of correcting address data, affixing ZIP+4 codes and appending geocodes. By correcting address information and applying geocodes simultaneously, users can achieve significantly higher geocode match rates in a single pass of data files. StreetRite allows users of geocoding and mapping software to standardize and correct address data and append ZIP+4 codes before appending geocodes, by comparing addresses against the USPS National Database. It employs a Windows interface and now provides automatic access to MapMarker via a selection box on the StreetRite menu. For more information call 800-368-5806.

## A sweet Profiler suite from Claritas

The new Profiler databases from Claritas, Arlington, Va., are designed to help marketers visualize the demographic and commercial profile for any area of the U.S. The suite of products works with Microsoft Excel's Data Map feature, incorporating basic mapping in the spreadsheet software so users can visually map key information. Users can download and combine Claritas demographics with proprietary information to determine site locations, project sales, determine market penetration, assess market potential and more. There are seven databases in the Profiler series: banking, business-to-business, health care, media, neighborhood, real estate and retail. All seven files share a basic set of 10 key demographics, including total population, median age, median household income, median housing value, education and employment and then a set of demographic variables specific to the database topic. The databases can be formatted for many popular spreadsheet, database and mapping programs, including Excel, Lotus, ASCII, dBASE, MapInfo, Tactician and ArcView and are now available through Claritas Data Services and authorized MapInfo dealers. For more information call 800-234-5973.

## SPSS 7.0 for Windows ships

At presstime, SPSS was due to begin shipping the Windows 95 version of its software SPSS 7.0 for Windows early this year. The product features all-new presentation capabilities that give users full control over the appearance of tables of statistical results. Now, users can create tables by choosing from a library of presentation-ready formats called TableLooks. Users can further customize their reports and highlight items by modifying color, fonts, line styles and headings. The product also features flexible new pivot tables, which allow users to reorganize tables to look at their results from different angles by dragging an icon. The tables can also be moved into other applications or the Windows 95 desktop through SPSS' implementation of OLE 2.0 in-place editing and automation features. The product also includes a Windows 95 interface with floating windows and toolbars, and context menus including "What's This?" pop-up help. For more information call 800-543-2185.

## Objective shops

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- stand when a customer approaches his/her desk;
- make eye contact and smile at the customer;
- introduce him/herself;
- ask the customer's name;
- shake the customer's hand;
- offer the customer a seat.

While managers may agree easily on most of these behaviors as desirable, there could be a debate on a particular item. For example, we have had bankers that argued rather hotly whether it was necessary to shake the customer's hand in every case. In one instance, bank employees felt that older female customers were not used to shaking hands. In another case, bank employees said they didn't like shaking hands with people who were "dirty" (like construction workers who come into the bank right from the job site). Management needs to consider these kinds of issues, then make a decision.

Generally, if management leaves it up to an employee about how to act in a certain situation, then management is foregoing the opportunity to make that particular behavior a service standard. Accordingly, it should not be included on the scoring sheet used by a mystery shopper.

You'll note that each of the five statements on the list above is a specific and observable behavior. This is much different than asking the mystery shopper to tell you if the employee was courteous at the beginning of the conversation. We say, "To be measured and managed, it must be observable."

By carefully defining the behaviors that constitute a courteous interaction, we get an objective gauge of whether employees are being courteous rather than an subjective opinion, which could vary widely from one shopper to another. The same approach applies to other behaviors as well, such as consultative selling skills which involve asking questions to determine the customer's need, presenting alternatives for the customer's consideration, recommending one, asking for the business, and so on.

Once the specific desirable behaviors are listed and described, then a scoring sheet can be created. On the scoring sheets we develop, we do our best to list each of the behaviors in the order they will likely happen during the interaction between the shopper and the employee. In the field, this will make it easier for the shopper to recall the interaction as it unfolds, and therefore, score it more accurately.

For example, in serving a customer in a bookstore, management has decided that a floor employee should (1) ask questions to determine the customer's area of interest, (2) take the customer to the appropriate section of the store, (3) show the customer several alternative titles, (4) help the customer decide which one(s) to buy, and (5) ask if there is something else they can help the customer with.

**Exhibit A:**

**Excerpt from a typical Mystery Shop Scoring Sheet**

**Store** Sun Valley **Date** 1/21/96

**Employee** Mary Blase' **Shopper** DK
**(describe if no name tag visible)**

**Time entered store** 11:20 **Time exited store** 11:32

**Time spent waiting for employee** 2 **minutes**

1 2 3 4 5 **Asks Questions** (must do all three to score a 5)
✓ Greets customer with a smile
✓ Asks "Is there something in particular I can help you with today?"
✓ Asks at least one additional follow-up question to assist customer

__ No / ✓ Yes **Takes customer to appropriate section of the store**

__ No / ✓ Yes **Shows customer two more titles**

Thus, to lay the foundation for an objective and credible shopping program, start with the specification of the service standards and the development of a detailed, behavior-oriented scoring sheet.

Hint: Have staff people take your draft mystery shop scoring form into the field and try it out. Generally, we conduct a trial with at least five shops so we get a good feel for how well the scoring sheet stands up under various situations. The task here is to be sure that the statements on the form are clear and not subject to misinterpretation.

2. *Screen potential mystery shoppers carefully.*

When I meet someone and mention our mystery shopping activities, frequently the first question asked of me is "How do you find people to be your mystery shoppers?" (The second often is, "Can I be one? It sounds like fun!")

Finding a mystery shopper goes well beyond identifying someone who has an interest in playing the part of a customer. We have clients who carefully review every scoring sheet we turn in to them — and some make shopping results part of their managers' performance reviews.

Consequently, we must take steps to ensure not only the overall integrity of our results and reports, but the integrity of every shop we accept for data entry and tabulation. This means finding people who can do this job faithfully, accurately and objectively. If you haven't tried it, you will likely find that this is harder than it sounds! We run newspaper ads and also rely on temporary employment agencies to provide a pool of interested, potentially qualified mystery shoppers. Then we meet with the candidates personally to assess how well they fit the task. The key qualities we are looking for include:

• No obvious bias for or against company to be shopped — Hint: Before telling a candidate what business will be shopped, ask a series of screener questions in order to disqualify people who have a grudge against a specific business or type of business. Also ask questions to disqualify people who have a direct family member working in the business to be shopped.

• Ability to "role play" the desired customer role — This includes responding to questions that might naturally come up (e.g., asked of a new customer opening a bank account: "So you work at ZZ Technologies. Do you know Sandy Lehner?").

Hint: During recruiting, role play situations that have (or could) happen in the field in order to see how different candidates react.

• Ability to be neutral throughout the transaction — In their interactions with employees, whether in-person or by phone, shoppers need to be neither too friendly nor too distant. For example, we once encountered a person whom I'll call Sally Sunshine. She passed our initial screening process and was sent out to perform her first set of real shops. When she returned, it was clear from both her written comments and her verbal remarks to us that she was having a tough time being objective. She consistently gave retail store employees scores that were too high based on the behaviors actually encountered, explaining that this was because certain employees "seemed so nice."

While we often add a final scoring category regarding the overall courtesy and helpfulness that is intentionally intended to get at the feeling a customer/shopper gets from the employee, this is typically the only place that being extremely nice to a customer gets scored.

Alas, Sally didn't make the grade.

Hint: Conduct a role play in a group or one-on-one training situation. Give the candidate a scoring sheet and ask him/her to score an interaction that you stage, and then see if they score it correctly and what they have to say about the interaction they have just observed.

• Ability to accurately recall the details of the experience — This is critical in order to complete the scoring sheet after leaving premises. Our shoppers must write a short commentary of key points in the service encounter as well as check and score the behaviors we have agreed to look for.

Hint: Use the same exercise as the one described above to judge this. Plus, you can send them into the field on a trial run...which brings us to our next point.

3. *Try them out—before turning over a set of shops to be done.*

Before you assume that you've got a shopper who can be accurate, thorough and objective, send them out for a few trial shops. If possible, go with them and observe the interaction they have with an employee being shopped. Then have the shopper fill out a scoring sheet and see if they score it like you would have.

This will tell you very quickly whether this person is likely to be an effective mystery shopper. It also affords an opportunity for the potential shopper to bail out if they don't like the work, too, before you've placed your trust in them to go out and complete 15-25 shops.

**Exhibit B:**

1 2 3 5 **Asks Questions** (must do all three to score a 5)
✓ Greets customer with a smile
✓ Asks "Is there something in particular I can help you with today?"
____ Asks at least one additional follow-up question to assist customer

Should be a "5" not a "3"

**Exhibit C:**

__ No / ✓ Yes **Takes customer to appropriate section of the store**

__ No / ✓ Yes **Shows customer two more titles**

Scored correctly

**Comments:**

After greeting me and asking "how he might be of help to me," John took me to the Biography section and pointed to the books and said I'd find lots of books about Kennedy on the top shelf. He said he'd back in a few moments to check with me. I didn't see him again.

Scored incorrectly!

We send a "shopper in training" to a competitor's location, not to our client's place of business. (The same idea works even better for telephone mystery shops.) This way, if the shopper doesn't do a good job, we haven't compromised the quality of our shopping program.

An interesting side note: Because our firm conducts a large volume of customer satisfaction research, we've found that some individuals can do a good job of conducting telephone interviews and also performing telephone mystery shops. Ironically, for us, this has been the exception rather than the rule, however. Most people turn out to be good at (and like to do) one or the other, not both!

4. *Review each completed scoring sheet in detail before approving it for data entry.*

Since staff time is involved in this step, this may be the one that gets overlooked or shortchanged. Soon after the scoring sheets arrive at our office, we check each sheet, in detail, before sending it along for data entry and tabulation. Here are some of the checks and balances we use:

Make sure that the checked items are then scored correctly. Compare what has been written in the comments section to the scoring. (See Exhibits B and C.)

Call the shopper to discuss/resolve any apparent discrepancies. If we find discrepancies or omissions, we contact the shopper immediately to discuss the shop and its scoring. If the shopper can recall the details sufficiently, then we make corrections or changes to the scoring sheet. If not, then we feel that we have no choice but to follow step five.

5. *Be prepared to throw out any suspect shops—and re-shop these using another mystery shopper (or in a deadline situation, a staff member).* This is your final insurance. Being willing to throw out a "suspect" shop and re-shop the same location and/or employee ensures the credibility of the results you provide to your client. Being willing to do this, and do it at your own expense, reinforces the belief that the work done by your team reflects objectively what is actually going on out on "the front line."

Following these steps goes a long way toward providing objective and credible shopping results. And with these results, management is in a position to reward desired behavior, prioritize training and coaching needs, and over time boost the level of sales and service performance by frontline employees. ❑

## Texaco

continued from p. 11

tions this year.

The Building Tomorrow Together program also includes competitive research. In addition to shopping all of the Texaco locations, Maritz shoppers visit competing locations and evaluate them based on Texaco standards and criteria. The results of these baseline shops after two years of the program show that Texaco is ahead of its competition in delivering customer satisfaction.

**Gaining popularity**

With all this success, why is mystery shopping just now gaining popularity among companies like Texaco? "Customer satisfaction is becoming more and more important in creating customer loyalty with today's fickle customers," says Bob Smith, senior project director for Maritz Marketing Research. "And mystery shopping has just recently undergone a major image revitalization."

Maritz has added a new wrinkle to mystery shopping with a product it calls Virtual Customers, an integral part of the Texaco's Building Tomorrow Together program. "To create this new product, we have integrated our mystery shopping capabilities with performance improvement programs, using the findings to amplify and expand on other customer satisfaction research by implementing a certification process of all our mystery shoppers and by upgrading our computer management strategy to provide faster, more consistent tracking and reporting," Smith says.

Each shopper must be certified before they begin work as a Virtual Customer. There are three levels of certification. First-level customers complete a process that demonstrates their ability to handle the responsibilities and skills necessary to do the job well. They then receive job-specific training including periodic updates, bringing them to second-level status. Third-level individuals have completed training specific to an industry or company. Maritz keeps this skill-level and demographic information on each Virtual Customer in a nationwide database along with his or her past shopping performance.

**Human element**

"Mystery shopping is not an exact science," says Smith. "But it does add a unique human element to a research project because employees are evaluated in real life service situations." Through these evaluations, company management gets an accurate snapshot of how individual locations are handling customers and meeting service specifications. For instance, in the Texaco program, mystery shoppers are asked "Are squeegees available in the self-service bays?" and "Were you greeted with a smile and in a friendly manner by an attendant or the cashier?"

"These questions alone may not seem that important to the bottom line," says Smith, "yet as we've seen with the results from the first two years of the Building Tomorrow Together program, image and customer satisfaction do have an impact on sales, and that can make any company take notice." ❑

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Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-854-5101/ fax 612-854-8191.

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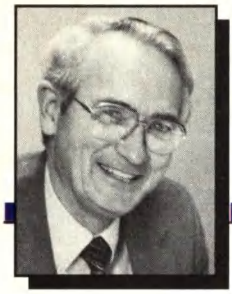

# From the Publisher

by Tom Quirk, Publisher

# Mystery shopping develops new image

*Service originally designed to test for integrity now used to determine customer service standards*

The intense competition in virtually every industry and every market has companies searching for any strategy that gives them an advantage in the marketplace. The two most obvious differentiators, price and quality, have not provided the definitive edge. Price leadership is difficult to achieve because margins can only go so low and quality can be difficult to define.

What's left? Service. The problem is, U.S. consumers don't just appreciate good service, they expect it. They have many alternatives for products and services and will happily seek them out if one provider isn't meeting their needs.

To make sure service standards meet customer expectations companies have established policies for employees throughout their operations. These rules of conduct are meant to foster a positive attitude toward the company and the products or services it offers. Making sure employees meet these standards is critical to success. Company management would like to believe customers are being treated according to these norms. How to make sure?

Mystery shopping. By deploying mystery shoppers on a regular, timely basis, companies get precise performance evaluations of employees and products.

Mystery shopping specialists got their start 50 years ago checking on employee and client integrity. Common early uses included determining employee honesty, price-checking to verify compliance with fair trade agreements, and finding out how retailers were presenting products and using signage and other point-of-purchase displays. Monitoring employee courtesy and interaction with customers was of secondary interest.

Since 1980 the situation has turned around. In industry after industry company management is evaluating how customers are treated when coming in contact with their employees. Qualitative reports have been expanded to include quantitative results and industry averages and norms have been developed. Local managers can use individual reports to measure their own situation while regional and company management can use summaries to determine trends, strengths and weaknesses.

For perspectives on where mystery shopping's role in business today, and to pick up some tips for buyers of mystery shopping services, I contacted four individuals, who, along with their firms, have years of experience in mystery shopping: Bill Smith, president of Certified Marketing Services, Kinderhook, N.Y.; Peter Thorwarth, president of Better Marketing Associates, Oaks, Pa.; Carol Cherry, president of Shop'n Chek Inc., Atlanta; and Christian Doomanis, vice president operations for Commercial Services Co., Van Nuys, Calif. Although each company initially provided mystery shopping services to different industries or specialized in different services, they offered remarkably similar opinions.

continued on p. 72

Quirk's
MARKETING RESEARCH
Review

# 1996

# Directory of mystery shopping firms

This is our first annual directory of firms that provide mystery shopping services. This directory was compiled by sending listing forms to companies that had advertised a specialization in mystery shopping. In addition to the company's vital information, we've included the industries they mystery shop, the type of mystery shopping services they offer, be it full service or just data collection, and the span of their services (national, regional or local). As an added feature, firms have been cross-indexed by the span of their services. The cross-index section, which can be found at the end of the directory, lists national mystery shopping firms alphabetically, regional mystery shopping firms by state and local mystery shopping firms by metropolitan area. We hope you find this directory useful. Please let us know how we can improve next year's edition.

## Codes

| | |
|---|---|
| RT | Retail |
| R/FF | Restaurant/Fast Food |
| B/I | Business/Industry |
| SVC | Service *(Bank, Insurance,Hotel, etc.)* |

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*(See advertisment on p. 16)*



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## Codes

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needs through a worldwide network of six national and four international offices that supervise our operations in over 60 countries. The Customer Satisfaction Division offers a full range of customer satisfaction research services: mystery shopper studies; customer satisfaction studies; employee satisfaction studies; benchmarking and competitor comparison studies; full qualitative services.
*(See advertisement on p. 44)*



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Fax 910-765-1109
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Frank Falkenhainer, V.P. Sales
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RT, R/FF, B/I, SVC

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*(See advertisement on p. 45)*

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Fax 818-997-1049
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Commercial Service Systems, Inc., has been providing the best in mystery shopping services since 1946. CSS, a leader in customized customer service and employee recognition programs, is able to suit any client's needs. In addition to offering nationwide coverage, CSS is fully licensed and insured.
*(See advertisement on p. 46)*

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*A New Way To Forecast New Product Volume*

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(a) from sales forecasts based on actual behavioral data

(b) by monitoring *real* shoppers buying real products where they normally shop

(c) by analyzing sales in light of normal competitive activity

(d) all of the above

(e) it's not possible to do any of the above

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Get *real* shoppers, real purchases, real results. Get RealTest. Call Frank Bossu, Ph.D., at 1-800-235-6519 or your local Elrick & Lavidge representative today for more information.

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Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Covington-Burgess Market Research Svc.
666 11th St. N.W., Ste. 730
Washington, DC 20001
Ph. 202-628-4640
Fax 202-628-3840
Elizabeth J. Burgess, President
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RT, R/FF, B/I, SVC

Crimmins and Forman Market Research, Inc.
29955 Southfield Rd.
Southfield, MI 48076
Ph. 810-569-7095
Fax 810-569-8927
Paula Crimmins or Lois Forman
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RT, R/FF, B/I, SVC

Customer Perspective
213 W. River Rd.
Hooksett, NH 03106
Ph. 603-647-1300
Fax 603-647-0900
Judith Ann Hess, Partner
Nat'l. - Full Service
RT, R/FF, B/I, SVC

The Cutting Edge of Research, Inc.
205 E. Washington St.
La Grange, KY 40031
Ph. 502-222-1263
Fax 502-222-6693
Rebekah Styton Ashcraft, President
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Davison Research & Consulting
1473 12th St. Ct. E.
West Fargo, ND 58078
Ph. 701-282-8410
Fax 701-282-4202
Kevin Davison, President
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RT, R/FF, SVC

Decision Research
4480 Vieja Dr.
Santa Barbara, CA 93110
Ph. 805-967-0689
Fax 805-967-2389
Ruth Abrams, Owner
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Dennis Research Service, Inc.
3502 Stellhorn Rd.
Ft. Wayne, IN 46815
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Fax 219-485-1476
Pat Slater, Director
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RT, R/FF, B/I, SVC

Cynthia Deutsch Interviewing
323 Southampton B
W. Palm Beach, FL 33417
Ph. 407-471-8614
Fax 407-471-8614
Cynthia Deutsch, Owner
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Eagle Research
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Denver, CO 80228
Ph. 303-980-1909
Fax 303-980-2270
Freddi Wayne or Christine Balthaser
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**Elrick & Lavidge**
1990 Lakeside Pkwy., 3rd fl.
Tucker, GA 30084
Ph. 770-621-7618
Fax 770-621-7666
E-mail: elavidge@mindspring.com
Gary Harper, Vice President
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*(See advertisement on p. 47)*

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Syosset, NY 11791
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Fax 516-364-4683
Edward Epstein, President
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RT, SVC

Field Dynamics of Ohio
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Westerville (Columbus), OH 43081
Ph. 800-551-2257
Fax 614-898-3031
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RT, R/FF. SVC

Focuscope, Inc.
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Oak Park, IL 60301-1011
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Fax 708-386-1207
Kevin Rooney, Sr. Proj. Dir.
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Seattle, WA 98102
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Fax 206-726-5620
Cheryl Nicholl, Vice President
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RT, R/FF, B/I, SVC
Branch:
729 N.E. Oregon St., Ste. 150
Portland, OR 97232
Ph. 503-236-4551
Sharon Marson, Mgr., Outside Field

Polly Graham & Associates
3000 Riverchase Galleria, Ste. 310
Birmingham, AL 35244
Ph. 205-985-3099
Fax 205-985-3066
Cindy Eames, Vice President
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Pat Henry Market Research, Inc.
230 Huron Rd. N.W., Ste. 100.43
Cleveland, OH 44113
Ph. 216-621-3831
Fax 216-621-8455
Mark Kikel, V.P. Ops.
Reg. - Full Service
RT, R/FF, B/I, SVC

Herron Associates, Inc.
710 Executive Park Dr.
Greenwood, IN 46143
Ph. 317-883-3800
Fax 317-882-4716
E-mail: Herron@Indylink.com
Sue Nielsen, Dir. Data Collection
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Highsmith-Charnock Interviewing Svc., Inc.
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Augusta, GA 30909-3532
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Fax 706-733-9548
Doris Highsmith, Owner
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RT, R/FF, B/I, SVC

Houston Consumer Research
730 Almeda
Houston, TX 77075
Ph. 713-944-1431
Fax 713-944-3527
Adrienne Goldbaum, President
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RT, R/FF, SVC

Information Research, Inc.
10650 E. Bethany Dr.
Aurora (Denver), CO 80014
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Fax 303-751-8075
Norman Petitt, Owner
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Integrated Research Associates
P.O. Box 428637
Cincinnati, OH 45242
Ph. 513-985-2700
Fax 513-985-2703
Timothy E. Ryan, V.P. Rsch. & Ops.
Nat'l. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Isaacson Group
1827 Haight St., Ste. 2
San Francisco, CA 94117-2711
Ph. 415-564-4525
Fax 415-564-4417
E-mail: i6n grp@aol.com
Gary Isaacson, Principal
Reg. - Full Service
RT, R/FF, SVC

Issues and Answers Network, Inc.
5151 Bonney Rd.
Virginia Beach, VA 23462
Ph. 804-456-1100
Fax 804-456-0377
Annette Hazouri, Mgr. Qual. Rsch.
Reg. - Full Service
RT, R/FF, B/I, SVC

Jackson Associates, Inc.
1140 Hammond Dr., Bldg. H
Atlanta, GA 30328
Ph. 770-394-8700
Fax 770-394-8702
April McDowell, Field Director
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

JRA, Inc. (J. Reckner Associates)
587 Bethlehem Pike, Ste. 800
Montgomeryville, PA 18936-9742
Ph. 215-822-6220
Fax 215-822-2238
Nancy Kolkebeck, Vice President
Reg. - Data Collection/Field Svc.
RT, R/FF, SVC

JRP Marketing Research Services, Inc.
100 Granite Dr., Terrace level
Media, PA 19063
Ph. 610-565-8840
Fax 610-565-8870
Paul R. Frattaroli, President
Local - Full Service
RT, R/FF, SVC

Keystone Marketing Rsch. & Cnsltg.
P.O. Box 44
Marietta, PA 17547-0044
Ph. 717-426-1511
Fax 717-426-3318
Janet Kell, Vice President
Reg. - Full Service
RT, R/FF, SVC
Branch:
21 Pebble Dr.
Millsboro, DE 19966
Ph. 302-945-5170
Fax 717-426-3318
Janet Kell, Vice President

Kirk Research Services, Inc.
Roosevelt Mall
4525 Roosevelt Blvd.
Jacksonville, FL 33210
Ph. 904-387-0883
Fax 904-387-0268
Rebecca Kirk, Vice President
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Rickie Kruh Research
2138 S. Bay Ln.
Reston, VA 22091
Ph. 703-476-4444
Fax 703-620-3333
Rickie Kruh, President
Nat'l. - Full Service
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## Codes

RT ................ Retail
R/FF ............ Restaurant/Fast Food
B/I ................ Business/Industry
SVC ............. Service *(Bank, Insurance,Hotel, etc.)*

L.A. Research, Inc.
9010 Reseda Blvd., Ste. 109
Northridge, CA 91324
Ph. 818-993-5500
Fax 818-993-5664
Adrienne Goldbaum, President
Reg. - Data Collection/Field Svc.
RT, R/FF, SVC
Branch:
5222 Arlington Ave.
Riverside, CA 92504
Ph. 909-358-0300
Fax 909-358-0309
Adrienne Goldbaum, President

Las Vegas Surveys, Inc.
1516 S. Eastern Ave.
Las Vegas, NV 89104
Ph. 702-598-0400
Fax 702-598-0883
Carlos Kelly or Elaine Bannister
Reg. - Full Service
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Fax 212-889-6066
Barry Leeds, President
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*(See advertisement on p. 49)*

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Fax 212-941-7031
E-mail: Blas@MacroInt.com
Marshall Blas, Sr. Vice President
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Fax 954-755-3061
Eric Lipson, Vice President
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC
Branch:
Rte. 130 & Cinnaminson Mall
Cinnaminson, NJ 08077
Ph. 609-786-8514
Fax 786-0480
Judy Abrams, Manager
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Fax 314-827-3224
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Virtual Customers[SM] from Maritz Marketing Research, Inc. is a fully-integrated service quality evaluation system. It utilizes advanced technology for fast reporting and a unique certification process to mirror real customers so closely that they "virtually" become your customers. Virtual Customers is a seven-step process aimed at improving bottom line results. There are over 5,000 virtual customers in 500 cities nationwide.
*(See advertisments on pp. 5, 32)*

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Ph. 312-769-6268
Fax 312-769-6258
Vito P. Cifaldi, Partner
Local - Full Service
RT, R/FF, B/I, SVC

Market Trends, Inc.
3633 136th Pl. S.E., Ste. 110
Bellevue, WA 98006
Ph. 206-562-4900
Fax 206-562-4843
Jeff Liekhus, Vice President
Nat'l. - Full Service
RT, R/FF, SVC

Market Trends Pacific, Inc.
1136 Union Mall, Ste. 310
Honolulu, HI 96813
Ph. 808-532-0733
Fax 808-532-0744
John Itamura, Vice President
Local - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Marketing & Research Resources, Inc.
5705 Industry Ln., 2nd fl.
Frederick, MD 21704
Ph. 301-694-2800, ext. 117
Fax 301-694-5171
Lisa Hammer, V.P Rsch.
Nat'l. - Full Service
RT, R/FF, B/I, SVC

Marketing Advantage Research Cnslts., Inc.
2349 N. Lafayette St.
Arlington Heights, IL 60004
Ph. 708-670-9602 or 800-935-4220
Fax 708-670-9629
E-mail: mjrichards@aol.com
Marilyn Richards, President
Reg. - Full Service
RT, R/FF, B/I, SVC

Marketing Network Int'l.
790 Farmington Ave., Ste. 2
Farmington, CT 06032
Ph. 860-676-1586
Fax 860-676-8514
John Watson, Vice President
Nat'l. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Marketrends, Inc.
103 Charles River Landing Rd.
Williamsburg, VA 23185
Ph. 804-229-3065
Fax 804-229-1828
E-mail: Mktrends@aol.com
Nancy Fuller, Owner
Reg. - RT, R/FF, B/I, SVC

MATRIXX Marketing Research
4600 Montgomery Rd., Ste. 400
Cincinnati, OH 45212
Ph. 800-323-8369
Fax 513-841-0666
Brian D. Goret, Acct. Exec.
Local - Full Service
RT, R/FF, B/I, SVC

Mazur/Zachow, Inc.
4319 N. 76th St.
Milwaukee, WI 53222
Ph. 414-438-0805
Fax 414-438-0355
Barbara Steigerwald, Project Director
Local - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Meister & Associates
8737 Gregory Way, Ste. C
Beverly Hills, CA 90211
Ph. 310-659-3378
Fax 310-659-3380
E-mail: meisterco@earthlint.net
Lauren Meister, Principal
Nat'l. - Full Service
RT, R/FF, B/I, SVC

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Carrollton, TX 75007
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Fax 214-394-1312
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RT, R/FF, B/I, SVC

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58 W. 40th St.
New York, NY 10018
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Fax 212-768-0268
Jeffrey Friedlaender, Dir. Client Svcs.
Nat'l. - Full Service
RT, R/FF, B/I, SVC

Mid-Iowa Interviewing, Inc.
1551 Valley West Dr., Ste. 157A
W. Des Moines, IA 50266
Ph. 515-225-6232
Fax 515-225-1184
Doug Brown, President
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RT, R/FF, B/I, SVC

Midwest Survey & Marketing
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Omaha, NE 68114
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Fax 402-392-1068
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Fax 201-703-6870
Raymond Capozzi, President
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*(See advertisement on p. 51)*

## Codes

RT ................ Retail
R/FF ............ Restaurant/Fast Food
B/I ................ Business/Industry
SVC ............ Service *(Bank, Insurance,Hotel, etc.)*

National Field & Focus
190 N. Main St.
Natick, MA 01760
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RT, R/FF, BI, SVC

National Opinion Research Services
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Miami, FL 33172
Ph. 800-940-9410
Fax 305-553-8586
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Fax 603-883-1119
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Fax 205-985-3346
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NorTex Research
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Dallas, TX 75247
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Fax 214-630-6769
Kelly Lynn Ireland, Field Director
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O'Hare In Focus
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Des Plaines, IL 60018
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Fax 708-824-3259
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Greenbelt, MD 20770
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Fax 301-474-4307
Jill L. Siegel, President
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RT, R/FF, SVC

Opinions of Sacramento
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Sacramento, CA 95825
Ph. 916-568-1226
Fax 916-568-6725
Hugh Miller, Co-owner
Reg. - Data Collection/Field Svc.
RT, R/FF, BI, SVC

Perceptive Market Research, Inc.
2306 S.W. 13th St., Ste. 807
Gainesville, FL 32608-2001
Ph. 904-336-6760 or 800-749-6760
Fax 904-336-6763
E-mail: 102403,203@compuserve.com
Dr. Elaine Lyons-Lepke, President
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Precision Field Services
10600 W. Higgins Rd., Ste. 100
Rosemont, IL 60018
Ph. 847-390-8666
Fax 847-390-8666
E-mail: ades1@aol.com
Scott Adleman, Vice President
Local - Data Collection/Field Svc.
RT, R/FF, SVC

Prince Market Research, Inc.
2323 Hillsboro Rd., #500
Nashville, TN 37212
Ph. 615-292-4860
Fax 615-292-0262
Dan Prince, President
Reg. - Full Service
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Professional Research Group
154 Salem Ave.
P.O. Box 2344
Pt. Charlotte, FL 33949-2344
Ph. 941-380-9100
Fax 941-624-4822
Peter M. Golding, President
Local - Data Collection/Field Svc.

PWI Research, Inc.
5100 Poplar Ave., Ste. 3125
Memphis, TN 38137
Ph. 901-682-2444
Fax 901-682-2471
E-mail: Lewinstead@aol.com
Lea L. Winstead, President
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Ph. 714-974-8020
Fax 714-974-6968
Ryan Reasor, President
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Framingham, MA 01701
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Fax 508-875-4719
John Boni, President/G.M.
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Western Sales/Field Office
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Cara Kohn-Longo

Mesa, AZ
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Lori Weingarten

Leesburg, FL
Ph. 904-365-0505
Tracey Seitz

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Randy Carson

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Ph. 404-843-3807
Lisa Nickell

Kennesaw, GA
Ph. 770-423-0884
Lucille Slowey

Vernon Hills, IL
Ph. 708-367-0036
Jennifer Sines

Chicago, IL
Ph. 312-581-9400
Jim Dague

Framingham, MA
New England Field
Ph. 508-879-0412
Anthony Badway

Framingham, MA
Framingham Focus
Ph. 508-620-5490
Christine Rigopoulos

Dedham, MA
Ph. 617-326-0865
Dolly Rooney

Watertown, MA
Ph. 617-924-8486
Bonnie MacDonald

Taunton, MA
Ph. 508-822-0333
Adrianne DiPietro

Taylor, MI
Ph. 313-287-3600
Donna Wizinsky

Burnsville, MN
Ph. 612-894-5868
Helen Nelson

St. Louis, MO
Ph. 314-291-8888
Fletcher Peacock

Sante Fe, NM
Ph. 505-471-1699
Scott Solis

Albany, NY
Ph. 518-456-8641
Pat Figler

Massapequa, NY
Ph. 516-541-5100
Sing Ehrenfreund

Brooklyn, NY
Ph. 718-338-3388
Nancy Ann Frangipani

Durham, NC
Ph. 919-489-3104
Brian O'Neill

Oklahoma City, OK
Ph. 405-631-9738
Jaime Rodriguez

Bensalem, PA
Ph. 215-322-0400
Alice Osborne

Philadelphia, PA
Ph. 215-722-6765
Phyllis Weiss

Philadelphia, PA
Ph. 215-281-9304
Christine Wilson

Antioch, TN
Ph. 615-731-0900
Kathleen Love

Austin, TX
Ph. 512-327-8787
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Corpus Christi, TX
Ph. 512-993-6200
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Ph. 804-826-0299
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Ph. 206-474-9980
David Kubista

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Toronto, ON M4P 1L3
Canada
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Fax 416-488-2391
Suzanne Lefebvre, President
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Cleveland, OH 44128
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Fax 216-464-7864
Shirley Jacim or Mary Ann Sheets
Local - Data Collection/Field Svc.
RT, R/FF, SVC

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Fax 515-576-5454
Clarice Rossow, Owner/Manager
Reg. - Full Service
RT, R/FF, BI, SVC

Rothermel Research, Inc.
107 Elm Tree Ln.
Elmhurst, IL 60126-3616
Ph. 708-834-8330
Fax 708-834-3182
Karen G. Rothermel, President
Local - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

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San Diego, CA 92120
Ph. 619-265-2361
Fax 619-582-1562
Jean Van Arsdale, President
Reg. - Full Service
RT, R/FF, B/I, SVC

Bernadette Schleis & Associates, Inc.
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Evanston, IL 60201-3616
Ph. 708-869-5999
Fax 708-869-6644
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Nat'l. - Full Service
RT, R/FF, B/I, SVC

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E-mail: sas mktres@aol.com
Steven A. Schlesinger, President
Nat'l. - Data Collection/Field Svc.
RT, R/FF, BI, SVC

Schlesinger Associates has been conducting mystery shopper programs for over 20 years. We have conducted mystery shops in banks, restaurants, retail establishments, automobile dealerships, etc. We have over 300 mystery shoppers available across the country.
*(See advertisment on p. 25)*

Schwartz Field Service, Inc.
8902 N. Dale Mabry, Ste. 102
Tampa, FL 33614
Ph. 813-933-8060
Fax 813-935-3496
Joyce Powell, Facility Director
Reg. - Full Service
RT, R/FF, SVC

## Codes

| | |
|---|---|
| RT | Retail |
| R/FF | Restaurant/Fast Food |
| B/I | Business/Industry |
| SVC | Service *(Bank, Insurance, Hotel, etc.)* |

Seaport Surveys, Inc.
34 Cliff St.
New York, NY 10038
Ph. 212-608-3100
Fax 212-608-4966
Andrea Waller, President
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Seaport Surveys, Maine
44 Oak St.
Portland, ME 04101
Ph. 207-756-7770
Fax 207-756-7777
E-mail: jkick@biddeford.com
John Kumnick, President
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Seek Research
2641 Drayton Dr.
Wilmington, DE 19808
Ph. 302-998-3088
Gary A. Pellegrini, Principal
Local - Full Service
RT, R/FF, BI, SVC

Service Research Corporation
6201 S. 58th, Ste. A
Lincoln, NE 68516
Ph. 402-434-5000
Fax 402-434-5006
Gloria Britten, Vice President
Nat'l. - Full Service
RT, R/FF, BI, SVC

Millie Sevedge & Associates
1822 N. 69th St.
Milwaukee, WI 53213
Ph. 414-453-6086
Fax 414-453-6087
Millie Sevedge, Owner
Local - Full Service
RT, R/FF, BI, SVC

Shapiro Research Services, Inc.
Trumbull Shopping Park
5065 Main St.
Trumbull, CT 06611
Ph. 203-373-9391
Fax 203-371-4257
Sandy Shapiro, President
Local - Data Collection/Field Svc.
RT, R/FF, BI, SVC

**Shop'n Chek, Inc.**
7616 Perimeter Center E., N.E.
Atlanta, GA 30346
Ph. 800-669-9939
Fax 770-668-0816
Donna Garrou, V.P. Sales & Mktg.
Nat'l. - Full Service
RT, R/FF, B/I, SVC

Shop'n Chek specializes in custom designed mystery shopping programs to gather objective information regarding customer service performance internationally. Over 23 years experience in the restaurant/hospitality, retail, manufacturing, petroleum, services and utility industries. Shop'n Chek's 47,000 representatives act as our clients' "eyes and ears" with 100% location coverage guaranteed in the United States. Services include customer service evaluations, product presentation and pricing studies.
*(See advertisment on p. 55)*

Marion Simon Research Service, Inc.
49 Wildbriar Rd.
Rochester, NY 14623
Ph. 716-359-1510
Fax 716-334-9423
Marion Simon, President
Local - Data Collection/Field Svc.
RT, R/FF, B/I, SVC
Branches:
C103 Walden Galleria
Buffalo, NY 14225
Ph. 716-684-8025
Fax 716-684-3009
Sharon, Manager

Northern Lights Mall
Syracuse, NY 13212
Ph. 315-455-5952
Fax 315-455-1826
Angie, Manager

Southern Spectrum Research, Inc.
1600 Canal St., Ste. 400
New Orleans, LA 70112
Ph. 504-539-9222
Fax 504-539-9228
Linda DeCuir, Rsch. Coord.
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Spencer Research SRO II, Inc.
92 Westline Dr.
Daly City, CA 94015
Ph. 415-756-1426
Fax 415-992-7387
Sally Neilson, President
Reg. - Data Collection/Field Svc.
RT, R/FF, BI, SVC

Strategy Research Corporation
100 N.W. 37 Ave.
Miami, FL 33125
Ph. 305-649-5400
Fax 305-649-6312
Richard W. Tobin, President
Nat'l. - Full Service
RT, R/FF, BI, SVC

Superior Surveys of St. Louis, Inc.
10403 Clayton Rd.
St. Louis, MO 63131
Ph. 800-325-4982
Fax 314-692-2427
Carol McGill, Manager
Local, Data Collection/Field Svc.
RT, R/FF, BI, SVC

Survey Service, Inc.
1911 Sheridan Dr.
Buffalo, NY 14223
Ph. 716-876-6450
Fax 716-876-0430
Susan R. Adelman, President
Reg. - Full Service
RT, R/FF, B/I, SVC

Surveys Unlimited, Inc.
232 Vincent Dr.
East Meadow, NY 11554
Ph. 516-794-5650
Fax 516-794-3841
Gladys Ronco, President
Reg. - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

Wolf/Altschul/Callahan, Inc.
60 Madison Ave., Ste. 502
New York, NY 10010-1600
Ph. 212-725-8840
Fax 212-213-9247
Judi Lippert, V.P. Field Ops.
Nat'l. - Full Service
RT, R/FF, SVC

Sally E. Zorich & Associates
819 Ashland Ave.
St. Paul, MN 55104
Ph. 612-290-2564
Fax 612-290-2564
Sally Zorich, Owner
Local - Data Collection/Field Svc.
RT, R/FF, B/I, SVC

## NATIONAL MYSTERY SHOPPING

*These firms conduct mystery shopping on a nationwide basis.*

A+ Plus Research Services, Inc.
**ACG Research Solutions**
**Audits & Surveys Worldwide**
Better Marketing Associates, Inc.
Brown Koff & Fried, Inc.
Capstone Research, Inc.
**Certified Marketing Services, Inc. (CMS)**
**Commercial Service Systems**
Customer Perspectives
The Cutting Edge of Research, Inc.
**Elrick & Lavidge**
Edward Epstein & Assoc., Inc.
Field Dynamics of Ohio
Herron Associates, Inc.
Integrated Research Associates
**Barry Leeds & Associates, Inc.**
**Macro•AHF Mktg. Rsch. & Consultancy**
**Maritz Marketing Research, Inc.**
Market Trends, Inc.
Marketing & Research Resources, Inc.
Marketing Network Int'l.
Meister & Associates
Meyers Research Center
**MPS Research, Inc.**
O'Hare In Focus
Perceptive Market Research, Inc.
**Quality Controlled Services**
Quick Test, Inc.
Research House, Inc. (Canada)
Bernadette Schleis & Associates, Inc.
**Schlesinger Associates, Inc.**
Service Research Corporation
**Shop 'n Chek, Inc.**
Strategy Research Corporation
Wolf/Altschul/Callahan, Inc.

## REGIONAL MYSTERY SHOPPING

*These firms conduct mystery shopping on a regional basis. They are organized by state for your convience. See also National Mystery Shopping.*

### Alabama

New South Research
Polly Graham & Associates

### Arizona

Ask Arizona
Quick Test, Inc.

### California

AIS Market Research
Bartels Research Corp.
Decision Research
Isaacson Group
L.A. Research, Inc.
Opinions of Sacramento
The Question Shop, Inc.
Quick Test, Inc.
San Diego Surveys, Inc.
Spencer Research SRO II, Inc.

### Colorado

Information Research, Inc.

Quick Test, Inc.

### Delaware
Keystone Marketing Rsch. & Cnsltg.

### Florida
Bordner Research, Inc.
Kirk Research Services, Inc.
Mar's Surveys, Inc.
Quick Test, Inc.
Schwartz Field Service, Inc.

### Georgia
Compass Marketing Research
Jackson Associates
Quick Test, Inc.

### Illinois
Marketing Advantage Research Cnslts., Inc.
Quick Test, Inc.

### Indiana
Dennis Research Services, Inc.

### Iowa
Mid-Iowa Interviewing, Inc.
Rossow Interviewing

### Louisiana
Southern Spectrum Research, Inc.

### Maine
Seaport Surveys, Maine

### Maryland/Washington, DC
Bay Area Research

### Massachusetts
National Field & Focus
Quick Test, Inc.

### Michigan
Crimmins and Forman Market Research, Inc.
Quick Test, Inc.

### Minnesota
Quick Test, Inc.

### Missouri
Quick Test, Inc.

### Nebraska
Midwest Survey & Marketing

### Nevada
Consumer Research Center
Las Vegas Surveys, Inc.

### New Hampshire
New England Interviewing, Inc.

### New Mexico
Quick Test, Inc.

### New York/New Jersey
A One Research, Inc.
Frances Bauman Associates
Quick Test, Inc.
Seaport Surveys, Inc.
Survey Service, Inc.
Surveys Unlimited, Inc.

### North Carolina
Alar Market Research
NorTex Research
Quick Test, Inc.

### Ohio
Pat Henry Market Research, Inc.

### Oklahoma
Quick Test, Inc.

### Oregon
Gilmore Research Group

### Pennsylvania
JRA, Inc. (J. Reckner Associates)
Keystone Marketing Rsch. & Cnsltg.
Quick Test, Inc.

### Tennessee
Prince Market Research, Inc.
Quick Test, Inc.

### Texas
Houston Consumer Research
Merchandising Specialists
NorTex Research
Quick Test, Inc.

### Virginia
Issues and Answers Network, Inc.
Marketrends, Inc.
Quick Test, Inc.

### Washington
Gilmore Research Group
Quick Test, Inc.

## LOCAL MYSTERY SHOPPING

*These firms conduct mystery shopping on a local basis. They have been organized by metropolitan area for your conveience. See also Regional & National Mystery Shopping.*

### Albuquerque, NM
Business Information Group

### Augusta, GA
Highsmith-Charnock Interviewing Svc., Inc.

### Bridgeport, CT
Shapiro Research Services, Inc.

### Buffalo, NY
Marion Simon Research Service, Inc.

### Charlotte, NC
AOC Marketing Research

### Chicago, IL
Focuscope, Inc.
Market Research Recruiters
Precision Field Services
Rothermel Research, Inc.

### Cincinnati, OH
MATRIXX Marketing Research

### Cleveland, OH
Rosen Research

### Colorado Springs, CO
Brewer Research/The Springs

### Denver, CO
Eagle Research

### Fargo, ND
Davison Research & Consulting

### Honolulu, HI
Market Trend Pacific, Inc.

### Memphis, TN
PWI Research, Inc.

### Miami, FL
National Opinion Research Service

### Milwaukee, WI
Mazur/Zachow, Inc.
Millie Sevedge & Associates

### Minneapolis/St. Paul, MN
Sally E. Zorich & Associates

### Philadelphia, PA - Southern NJ
JRP Marketing Research Services, Inc.
Mar's Survey, Inc.

### Pt. Charlotte/Ft. Myers, FL
Professional Research Group

### Rochester, NY
Marion Simon Research Service, Inc.

### St. Louis, MO
Consumer Opinion Council Rsch. Ctr.
Superior Surveys of St. Louis, Inc.

### Syracuse, NY
Marion Simon Research Service, Inc.

### Washington, DC
Covington-Burgess Market Research Svc.
OMR (Olchak Market Research)

### West Palm Beach, FL
Cynthia Deutsch Interviewing

### Wilmington, DE
Seek Research

### Winston-Salem, NC
CB&A Market Research

Quirk's
MARKETING RESEARCH
Review

# 1996

# Ethnic research section



# Q & A

## with Felipe Korzenny

In conjunction with our annual ethnic research issue, QMRR spoke with Felipe Korzenny for some thoughts on the current state of research in Mexico and how the roles of research in the U.S. and Mexico compare and contrast.

Korzenny, president of Hispanic & Asian Marketing Communication Research (H&AMCR), Belmont, Calif., is well-qualified for the task. Born in Mexico City, he earned an M.A. and Ph.D. in communication research from Michigan State University. He was a professor of communication research at Michigan State and at San Francisco State University before starting H&AMCR in 1984. The company now has 13 full-time and 150 part-time employees. It also jointly owns SuperDatos de México, a Mexico City research firm, with Consumer Research Associates/Superooms, San Francisco. He was interviewed at H&AMCR's Belmont, Calif., offices in late November by QMRR's Lane Weiss.

**QMRR: How has marketing research fared in Mexico during the past five years?**

Felipe Korzenny: "At the end of 1994, marketing research in Mexico was doing quite well but it suffered a severe setback in 1995. However, it has started to recover in the past few months. The struggling Mexican economy has had an effect on marketing research because clearly companies tend to spend less money on research and other types of investments when resources are low or uncertainty is high. Exports have increased dramatically, which has helped the economy, but unemployment rates are high and foreign investment is down."

**How has the devaluation of the peso affected research and the economy?**

"It has had a dramatic effect on the economy in general and on research in specific. The Mexican peso has been devalued many times over the past 30 years but the most recent one was dramatic because it was not just an economic devaluation, it was joined by political instability. That has made this devaluation a serious one because when there is political instability and uncertainty people are less likely to risk investment and develop new markets.

"Devaluation has been particularly hard on companies like ours with offices in the U.S. and Mexico. We become less competitive when the peso is extremely low, until inflation catches up and then we become competitive again. The prices of some local competitors can be very low compared to what you would call international market prices for market research. However, there are some advantages that can affect market research in a reverse direction. Since exports have been increasing dramatically, then marketing research for products from Mexico has also increased because there is more interest in finding new markets in the affluent north."

**What percentage of research in Mexico is quantitative and what percentage is qualitative?**

"Approximately 25 percent is qualitative, 75 percent quantitative. It's hard to know for sure how much is spent on research because official figures are hard to come by. A Mexican association of research agencies has made some data available, but the figures are tentative. In 1994, [research revenues] were $80 million, an increase over 1993. We were expecting increases of about 15 percent per year in marketing research revenues. However, in 1995, because of the devaluation of the peso and the slowdown in the economy, only a few companies were able to keep up that pace. So it's estimated that the actual value of marketing research efforts in 1995 was half or less of what it was in 1994."

**What percentage of quantitative research is personal interviewing, telephone, mail, etc.?**

"The method that is used the most is door-to-door. Probably 75 percent of all quantitative research is done door-to-door, person-to-person. There is an increasing trend toward store and mall intercepts. I think that is going to increase more and more because door-to-door interviewing becomes onerous and difficult to control from a quality standpoint. That's why I think more and more companies are moving toward intercepts.

"There is very little mail research in Mexico. Regardless of whether the mail service is reliable, it is still not part of the culture to fill out a questionnaire that comes in the mail. Telephone interviewing is not very common but it will obviously increase as the telephone system improves and more and more people have access to telephones."

**How about qualitative?**

"Qualitative research in Mexico has grown substantially over the past 10 years, though not as much as it has in the U.S. It's mostly focus group research that is done in Mexico, in addition to some one-on-one interviewing. There are about 20 companies that do qualitative research and about 30 that do quantitative."

**Are most around Mexico City?**

"Yes. There are a few in other places. Monterrey and Guadalajara are beginning to see more professional facilities but you could count them on one hand. Most of the research done outside of Mexico City is being done in hotels and other locations.

"The set-up in Mexico is a bit different than in the U.S. Up here, most research facilities are available for anyone to rent or use. In Mexico there is the beginning of that but it is still mostly the companies who own the facilities who do the research in them. So for example a full-service marketing research company that does both quantitative and qualitative may have a focus group facility but they use it for their own purposes. Whereas here in the United States clients are more likely to hire a facility almost anywhere according to their own needs."

**Has the use of PCs had an impact on research in Mexico?**

"Computers have made a difference in the marketing research industry in Mexico in the same way they have in the U.S., in terms of data entry, processing, distribution. Now there is a lot more electronic transmission of data. Mexicans are extremely proficient in the use of computers for statistical analysis. There is much more of that going on right now. And yes, computers have made a difference. Very large surveys are updated very quickly now and data can be obtained very

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# The myths of ethnic marketing & research

By Kent I. Phillips

*Editor's note: Kent I. Phillips is president of Data Bank USA, a Fort Wayne, Ind., research firm providing market share studies for soft drink bottlers.*

As this is my first contributed article to this publication, I was hoping for a less controversial subject to write about. It seems I have a reputation for being something of a rebel as far as research approaches are concerned. Therefore, to be on the safe side here, I am not going to directly identify companies that market products nationally by their name, only by their product category. My commentary will be directed at national companies, not local or regional ones.

In the arena of ethnic marketing, most national companies operate with the following myths:

*Myth #1: The ethnic market is an entity.* Several national beverage companies claim that their brand leads the Hispanic market. These statements are made based on national data collected through scanner outlets in "Hispanic" areas. This is nonsensical. First of all, there is no Hispanic market, anymore than there is an African-American market. Or, I guess it would be safe to say that if these two things are true, then there are also German, French and Italian markets as well.

Let's look at this alleged Hispanic market first. Are we to believe that Spanish-speaking people in Miami with a Cuban heritage share the same brand preferences as Spanish-speaking people in the Southwestern areas, many of whom trace their culture to Mexico, or the several million Spanish-speaking New Yorkers with Puerto Rican backgrounds? I don't think so. The same holds true for African-American consumers in New York City versus Los Angeles.

Each of these groups has developed purchasing habits based on local marketing efforts and conditions. There is no similarity in Spanish-speaking consumption patterns, no more than there is in English-speaking Americans in Atlanta versus Minneapolis. Each region, city, and sometimes neighborhood has developed different brand preferences according to who has marketed to this group historically.

*Myth #2: Since the ethnic population is growing we need to design a national ethnic marketing plan.* You're welcome to develop as many national plans as you like, but they won't work. Research in advance of marketing today seems obsessed with obtaining information down to the local level. Several national scanner-based research companies are now touting individual store level scanner data to provide us information on consumer products. All retailers are deeply concerned about having products and store layouts that address the needs of the local shopper, not the chainwide average. So, why do national companies seek national research and marketing for ethnic groups? I don't know.

I do not feel that the ethnic issue exists, due to the fact that there is no difference between a marketing strategy for an ethnic neighborhood than there would be for a farming area. The point here is that national plans won't work unless they are executed uniquely at the local level. Plans must be translated to a single market. Therefore, the ethnicity of the market is irrelevant.

*Myth #3: Research data coming from ethnic markets is adequate.* Most national consumer product companies accept scanner data from major supermarket chains and a sprinkling of convenience stores and believe that this data represents the ethnic market. This is false.

The problem here is that in many cases one of the exciting and unique aspects of ethnic neighborhoods is a very strong independent retailing segment. In many cases, this retailing segment may have the exact opposite emphasis of the chain stores. As an example, the chain stores in one area were promoting beer and soft drinks in 24-pack cans and selling these products at a loss to build store traffic. The independent retailers in the area, some of whom only operate one or two stores, promoted six-packs and two-liters at a hot price to counter the chain stores' aggressive posture. The independent business segment lost fewer cents per unit, even though the stores lost money on each sale. The scanner companies would only track the sales in the chain stores, therefore, showing that perhaps 24-packs would be the lead item. Yet, the independent segment, far out-numbering the chain stores, was selling huge volumes of a directly opposite package. If a marketer is utilizing scanner to evaluate this marketplace, he or she is seriously mistaken.

By the same token, many of these chain stores do not reflect consumer purchase habits on non-featured products due to lack of distribution, shelf space or uncompetitive pricing. The net result is an inadequate and sometimes very misleading picture.

*Myth #4: The ethnic market is a price-driven market.* False. Some of the highest consumption levels on small package sizes and non-multi-packs is in the ethnic market. I believe that part of this misconception comes from the fact that many ethnic groups tend to purchase a larger percentage of some commodities, such as flour, beans and rice. But this certainly does not mean they are not concerned about quality and/or loyal to national brands. Many national marketers seem to think this is a discount-oriented segment. Those who would chase this market with price only will not succeed.

Virtually all demographics point to a growing ethnic population in the United States. This is one of the wonderful things about this country that adds to the excitement in living here and the challenges in marketing products to a changing society. Companies that collect the proper information and can develop a strategic plan to market locally, ethnic or not, will be the ones that thrive in the new millennium. ❑

# Spanish-language advertising boosts loyalty

By Felipe Korzenny, Betty Ann Korzenny, Rebecca Abravanel and Adrien Lopez Lanusse

*Editor's note: Felipe Korzenny, Ph.D., Betty Ann Korzenny, Ph.D., Rebecca Abravanel, Ph.D., and Adrien Lopez Lanusse are all senior research personnel at Hispanic & Asian Marketing Communication Research, Belmont, Calif.*

Take a look at the table below. It shows the percentages of Spanish-dominant female heads of household who reported having in their home the brands in selected product categories. Respondents also were asked about their preferred airline, car make and fast food restaurant. Any surprises?

| | | |
|---|---|---|
| Cold cereal | Kellogg's Corn Flakes | 38% |
| Toothpaste | Colgate | 78% |
| Deodorant | Secret | 35% |
| Laundry detergent | Tide | 57% |
| Shampoo | Pantene | 30% |
| Beer | Budweiser | 50% |
| Preferred airline[1] | American | 49% |
| Preferred car make[2] | Toyota | 24% |
| Most often visited fast food restaurant | McDonald's | 36% |

1 Among those with a preference
2 If looking to purchase a car

The data are based on findings from 900 telephone interviews with randomly selected respondents as part of the quarterly omnibus of Spanish-dominant female shoppers in Los Angeles, New York City and Miami.

The brands that followed each of the above had a substantially lower share. What made the brands shown above their category leaders? Those with the largest share tend to be the ones with the more extensive Spanish-language advertising programs. Since Spanish-dominant consumers tend to be relatively recent immigrants, they strongly rely on advertising to guide their purchase decisions.

These consumers tend to see Spanish-language advertising as information that helps make sense of the confusing array of products available to them. Since few brands have decided to concentrate on the Spanish-language market, those who show an interest reap the rewards.

But there is more than just advertising. Tradition from Latin American countries seems to contribute to brand preferences. After immigration to the U.S., many Hispanic consumers remain loyal to the brands they grew accustomed to in their countries of origin.

Colgate is a good example. Colgate is the traditional toothpaste par excellence in many Latin American countries. Colgate red or Colgate *rojo*, aided by its Spanish-language advertising emphasis in the U.S., maintains and reinforces the tradition it established long ago.

There are products that are truly ingrained in the lifestyles and world-views of Latin Americans in the U.S. Kellogg's Corn Flakes is an example. Its prevalence in Latin America and its Spanish ad efforts in the U.S. seem to reinforce the synergy of its strong imagery and consumer following. Tide's strength seems to also be the result of heritage and U.S. communication efforts.

The chart above is full of examples of brands that have claimed their dominance mostly based on their strong Spanish-language advertising efforts in the U.S. They exemplify the great power of Spanish-language advertising to a market that appreciates being communicated with.

The moral of the story is: The Hispanic market is dominated by a small and select number of brands. Hispanic consumers tend to be less cynical about marketing and advertising than their general market counterparts. Opportunities exist to expand the range of choices available to these consumers. Marketers that have been loyal to this market seem to have derived just rewards. ❑

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promptly. I have seen firms in Mexico beginning to collect data on the streets using hand-held computers.

"Mexico tends to grab on to technology very fast. I read recently that a million Mexicans are already connected to the Internet. I think it's impressive for a less economically advantaged country to have that much interest in technology."

**Who are the major users of market research information about Mexico?**

"There is a large demand for public opinion research from the Mexican government. They are constantly taking the pulse of the people in terms of satisfaction with services and needs assessment. Then you have foreign firms, which, particularly with NAFTA, became more interested in conducting research. There are foreign firms that have been conducting business in Mexico for a long time — Kellogg's, Coca-Cola, Colgate-Palmolive — that have traditionally been collecting data. Procter & Gamble is an example of a very prosperous business in Mexico. They sell many of the same brands that they offer in the U.S. and they buy a large amount of research.

"There has been an increasing trend for foreign companies to collect fresh data to assess the potential of a particular product in Mexico. That has been happening more and more. Many more companies without a presence in Mexico want to know if there is a niche for them there."

**Are most projects large-scale or do most companies tend to stay with small projects?**

"That's a difficult question to answer because there are many projects of both sizes. You have situations where a company will do a few focus groups to find out a quick answer to some ad copy questions. Then there are large scale projects where thousands of people are interviewed. So it's hard to assess, but I would say that in general projects are smaller than in the U.S.

"That has to do with resources and the fact that Mexico is a less affluent country. Those who buy consumer products are a relatively small percentage of the population. It is estimated that only about 30 percent of the population earns more than $10,000 per year. Those are the people who will be buying consumer products in any large quantities. So that defines quite narrowly the type of constituency that you would talk to for consumer issues."

**Do many companies in Mexico have marketing research departments or is research handled by the sales or marketing managers?**

"A few of the larger companies in Mexico do have marketing research personnel. For example, the Leo Burnett ad agency has a strong presence in Mexico; they have their own research people in their offices in Mexico, and they buy their research from other suppliers. But other companies that are less geared to conducting research basically tend to delegate that to brand managers category managers."

**What is the future of research in Mexico?**

"I am very optimistic. I am used to the ups and downs of the Mexican economy, which tend to be somewhat cyclical. Mexico is a very robust country that has bounced back after many negative experiences so I am optimistic that it is going to again be extremely prosperous. It has to be. As one of the largest economies in the continent, it has to have the stamina to support its own population and to live in a coordinated prosperity with the United States. I think that's the key — being so close to the United States makes it particularly difficult for Mexico to allow itself to lag behind. It has to pick up and renew its energy and continue.

"I think in a few years marketing research in Mexico will be on the rise. With our SuperDatos de México branch, we saw a pronounced increase from '92 to '94 in demand for research services. We saw that go down in '95 but I think that in the next few years, as the economy stabilizes and people are more used to the new status quo, we will see again more marketers, national and international, entering the Mexican arena.

"NAFTA is the key reason to have optimism. It has some negatives but it also has strong positives for the U.S., Mexico and Canada. With the lowering of tariffs and with commerce made easier, marketing research in Mexico is likely to rebound and recover because manufacturers of consumer products in the U.S. are extremely interested in developing the Mexican market, which is 100 million consumers just south of the border." ❑

## Codes

1 ............ Full service
2 ............ Data collection/Field service
3 ............ Data processing/software
4 ............ Other (specified)

Next are the general ethnic groups the firm specializes in researching.

*Indicates firms that are owned by an ethnic minority.

A+ Plus Research Services, Inc.
1 MacArthur Blvd.
Haddon Township, NJ 08108
Ph. 718-796-0640 or 609-854-1555
Fax 609-854-0909
Linda Abend, President
2 - African-American, Hispanic

AIM RESEARCH

**Aim Research**
10456 Brian Mooney Ave.
El Paso, TX 79935
Ph. 915-591-4777
Fax 915-595-6305
Linda Adams, Project Director
Joy Gallegos, Associate Director
2 - Hispanic

AIM Research has 25 years experience conducting bilingual studies, both qualitative and quantitative among Hispanics. Focus groups, bilingual moderator, consumer surveys, telephone, pre-recruited. Studies are all conducted and supervised by an experienced, fully bilingual staff.
*(See advertisement on p. 65)*

H&AMCR, Inc.

***Asian Marketing Communication Research**
Div. of **H&AMCR, Inc.**
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 415-595-5028
Fax 415-595-5407
E-mail: Korfel@aol.com
Sandra M.J. Wong, Ph.D., Research Director
1 - Asian

Full-service qualitative and quantitative research in most Asian languages. Copy testing, motivational discovery, product design and evaluation, and cultural analysis for the positioning of products and services among Asians in the U.S. and abroad. Focus groups, in-depth interviews, surveys and tracking studies. Psycho-socio-cultural Asian research© is our unique approach. Our own facilities in the multicultural San Francisco Bay area available.
*(See advertisement on p. 15)*

*Asian Perspective, Inc.
386 Broadway, 5th fl.
New York, NY 10013
Ph. 212-431-9366
Fax 212-431-1282
Grace Chin, Research Director
1 - Asian

Behavior Research Center
1101 N. Third St.
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
Earl de Berge, Research Director
1, 2 - Hispanic

BG
The Blackstone Group

***The Blackstone Group**
360 N. Michigan Ave.
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
Ashref A. Hashim, President
1 - African-American, Asian, Hispanic

Full-service marketing research firm providing customized strategic research with in-house execution and advanced analytical capabilities. Services and facilities include 60+ CATI interviewing stations, three focus group suites of varying sizes with dual language taping capability, high-volume scanner for large scale studies, Namecraft™ name generation and testing service, SCAPE℠ new product research development program, and SEQualS℠ customer satisfaction/TQM program enhancement. Specialties include health care, energy, financial services/insurance, retailing and transportation research, both consumer and business-to-business. Expertise in large-scale tracking studies, qualitative research, international research. Ethnic Research with Asians, Hispanics, African-Americans.
*(See advertisement on p. 16)*

*Castillo & Associates
3604 Fourth Ave., Ste. 1
San Diego, CA 92103
Ph. 619-683-3898
Fax 619-683-3820
E-mail: castassoc@aol.com
Enrique F. Castillo, Principal
1 - Hispanic

*Covington-Burgess Market Research Svc.
666 11th St. N.W., Ste. 730
Washington, DC 20001
Ph. 202-628-4640
Fax 202-628-3840
Elizabeth J. Burgess, President
1 - African-American, Asian, Hispanic, Middle Eastern

**Creative & Response Research Services, Inc.**
500 N. Michigan Ave., Ste. 1200
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
Reyna Hohagen, Acct. Exec. Hispanic Mkt. Svcs.
1 - Hispanic

Data & Management Counsel, Inc.
P.O. Box 1609
608 Chadds Ford Dr.
Chadds Ford, PA 19397
Ph. 610-388-1500
1 - Asian, Hispanic

DIR
DIRECTIONS IN RESEARCH

**Directions In Research**
5353 Mission Center Rd., Ste. 310
San Diego, CA 92108
Ph. 619-299-5883 or 800-676-5883
Fax 619-299-5888
E-mail: 75061.02215@compuserve.com
David Phife
Patrick Elms
1, 2, 3 - Hispanic

Established in 1985, Directions In Research is a young

company employing motivated and experienced professionals dedicated to providing expert marketing research and consulting services. We are in the business of identifying, understanding and satisfying the needs of our clients. We answer those needs with intelligence, honesty, integrity and complete confidentiality. The value of our services is measured by the satisfaction of our clients. For both quantitative and qualitative research on the West Coast or nationwide, including bilingual studies, Directions In Research offers a complete package of services to help management, in both service and product industries, make informed decisions.
*(See advertisement on p. 31)*

The Dohring Company
550 N. Brand Blvd., 20th fl.
Glendale, CA 91203
Ph. 818-242-1600
Fax 818-242-3975
Dave Kalmus, V.P. Bus. Dev.
1 - Hispanic

*Ebony Marketing Research, Inc.
2100 Bartow Ave.
Baychester, NY 10475
Ph. 718-217-0842
Fax 718-320-3996
Bruce Kirkland, Vice President
1 - African-American, Hispanic

etc

**Erlich Transcultural Consultants**
21241 Ventura Blvd., #193
Woodland Hills, CA 91364
Ph. 818-226-1333
Fax 818-226-1338
Andrew Erlich, Ph.D., President
1 - African-American, Asian, Hispanic, Middle Eastern, Native American

Erlich Transcultural Consultants provides full service Latino, Asian, African-American and American Indian qualitative and quantitative research. This includes focus groups, in-depth individual interviews and the complete spectrum of quantitative studies conducted and supervised by bilingual, bicultural marketing professionals. We also conduct cultural awareness training.
*(See advertisement on p. 64)*

Field Dynamics Marketing Research
17547 Ventura Blvd., Ste. 308
Encino, CA 91316
Ph. 800-4-FIELDS
Fax 818-905-3216
Tony Blass, President
1 - African-American, Asian, Hispanic

It takes *fieldwork!*

**Fieldwork, Inc.**
500 N. Michigan
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
Sanford Adams, President
Branches:

**Fieldwork Atlanta, Inc.**
200 Galleria Pkwy., Ste. 1850
Atlanta, GA 30339
Ph. 770-988-0330
Fax 770-955-1555
Carolyn Lee, President
2 - African-American, Hispanic

**Fieldwork Boston, Inc.**
800 South St.
Waltham, MA 02154
Ph. 617-899-3660
Fax 617-893-5574
Vincent A. Stolo, President
2 - African-American, Native American

**Fieldwork Boston-Downtown, Inc.**
The Prudential Twr./Prudential Ctr., Ste. 1490
Boston, MA 02199
Ph. 617-351-2856
Fax 617-351-2865
Vincent A. Stolo, President
2 - African-American, Hispanic

**Fieldwork Chicago, Inc.**
6200 N. Hiawatha, Ste. 720
Chicago, IL 60646
Ph. 312-282-2911
Fax 312-282-8971
Sanford Adams, President
2 - African-American, Hispanic, Native American

**Fieldwork Chicago-O'Hare, Inc.**
8420 W. Bryn Mawr Ave., Ste. 650
Chicago, IL 60631
Ph. 312-714-8700
Fax 312-714-0737
Susan Brody, President
2 - African-American, Hispanic

**Fieldwork Chicago-West, Inc.**
1450 E. American Ln., Ste. 1880
Schaumburg, IL 60173
Ph. 708-413-9040
Fax 708-413-9064
Pam White, President
2 - African-American, Hispanic

**Fieldwork Denver, Inc.**
At The Tivoli/900 Auraria Pkwy., Ste. 601
Denver, CO 80204
Ph. 303-825-7788
Fax 303-623-8006
Anne McIntyre, President
2 - African-American, Hispanic, Native American

**Fieldwork East, Inc.**
2 Executive Dr.
Fort Lee, NJ 07024
Ph. 201-585-8200
Fax 201-585-0096
Carol Tauben, President
2 - African-American, Asian, Hispanic, Middle Eastern

**Fieldwork East at Westchester, Inc.**
555 Taxter Rd.
Elmsford, NY 10523
Ph. 914-347-2145
Fax 914-347-2298
Maria Garcia, President
2 - African-American, Hispanic

**Fieldwork Los Angeles, Inc. in Orange County**
Lakeshore Towers
18101 Karmen Ave.
Irvine, CA 92715
Ph. 714-252-8180
Fax 252-1661
Toni Day, President
2 - African-American, Hispanic

**Fieldwork Phoenix, Inc.**
7776 Pointe Pkwy. W.
Phoenix, AZ 85044
Ph. 602-438-2800
Fax 602-438-8555
Barbara Willens, President
2 - African-American, Hispanic, Native American

**Fieldwork Phoenix, Inc. at Scottsdale**
6263 N. Scottsdale Rd., Ste. 380
Scottsdale, AZ 85250
Ph. 602-443-8883
Fax 602-443-8884
Barbara Willens, President
2 - African-American, Hispanic, Native American

Strategic locations in key metro markets enable us to draw from a large, diversified and ever-changing population. fieldwork delivers the right respondents and the right results for any single or multi-market study. Why are fieldwork databases the best in the field? First, we develop and maintain a separate, custom database at each fieldwork facility. We even maintain separate databases for specific respondent categories. Fieldwork databases are cleaned frequently, so they're

## Codes

1 ............ Full service
2 ............ Data collection/Field service
3 ............ Data processing/software
4 ............ Other (specified)

Next are the general ethnic groups the firm specializes in researching.

*Indicates firms that are owned by an ethnic minority.

current and accurate. What's more, they're immediately accessible; it takes us less than an hour to produce the thousands of prospective respondents a project may require. Next, we employ a staff of specialists, trained in the nuances of recruiting, who know how to select qualified, well-screened applicants from our extensive database. Finally, we offer a full spectrum of integrated, up-to-the-minute services. Like faxed recruiting reports, which are updated each day. Immediate screening that lets us take your specs and develop screening questions for you when you're in a crunch. Plus, the ability to quickly create a computerized study universe that adheres to your research requests. If you're serious about the quality and accessibility of respondents, stop playing the field. Look to fieldwork to deliver the best demographic resources in the country.
*(See advertisement on the Back Cover)*

Findings International
9100 Coral Way, Ste. 6
Miami, FL 33165
Ph. 305-225-6517
Fax 305-225-6522
Orlando Esquivel, President
1, 2 - Hispanic

**Fleischman Field Research**
220 Bush St., Ste. 1300
San Francisco, CA 94104
Ph. 415-398-4140 or 800-277-3200
Fax 415-989-4506
Molly Fleischman, Principal
2, 4 (Focus Group) - Asian, Hispanic

Four large, luxurious focus group facilities with three-tiered seating for 12-plus viewers. Superior business/consumer/professional recruiting. Local/regional/national WATS telephone interviewing. Asian, Hispanic research. High standards and professional services.
*(See advertisement on p. 66)*

Focuscope, Inc.
1100 Lake St., Ste. 60
Oak Park, IL 60301
Ph. 708-386-5086
Fax 708-386-1207
Kevin Rooney, Sr. Proj. Dir.
2 - African-American, Hispanic

GENESYS

**GENESYS Sampling Systems**
565 Virginia Dr.
Fort Washington, PA 19034
Ph. 215-653-7100
Fax 215-653-7114
Amy Starer, Vice President
4 (Sampling) - all ethnic groups

GENESYS has the sampling experience and the technical expertise to help you target any low-incidence target group. Our ethnic sampling capabilities include geo-targeted RDD, listed surname, dual frame and many other sampling options. We will outline all your alternatives so you can decide which option will provide the optimal balance of representational accuracy and data collection cost.
*(See advertisement on p. 61)*

*Hispanic Focus Unlimited
Rte. 1, Box 278
La Feria, TX 78559
Ph. 210-797-4211
Fax 210-797-4244
Ruben Cuellar, President
1 - Hispanic

Hispanic MARKET CONNECTIONS, INC.
Bilingual/Bicultural Market Research

***Hispanic Market Connections, Inc.**
5150 El Camino Real, D-11
Los Altos, CA 94022
Ph. 415-965-3859
Fax 415-965-3874
Isabel Valdés, President
Michele Clark, Marketing Director
1 - Hispanic

Full-service research and consulting firm. Qualitative and quantitative techniques adapted to measure a very diverse market. In-house computer base sampling plan. Emphasis in strategic conceptualization, acculturation and analysis. HMC's Language Segmentation, V.I.P. (Visual Icon Probing), AMERITEST Hispanic Copytesting, AcuPoll Hispanic, Hispanic LIVES and ethnographic methods. President is co-author of Hispanic Market Handbook (Gale, 3/95).
*(See advertisement on p. 67)*

H&AMCR, Inc.

***Hispanic Marketing Communication Research**
Div. of **H&AMCR, Inc.**
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 415-595-5028
Fax 415-595-5407
E-mail: Korfel@aol.com
Felipe Korzenny, Ph.D., President
1 - Hispanic

Spanish and Portuguese language marketing research in the U.S. and Latin America. Full service qualitative and quantitative. Copy testing, product design and evaluation, and cultural analysis for the positioning of products and services among Hispanics. Focus groups, in-depth interviews, surveys and tracking studies. Expanded CATI facilities. Psycho-socio-cultural Hispanic research© is our unique approach. Our own facilities in San Francisco-San Jose Bay area available.
*(See advertisement on p. 15)*

*Images Market Research
1718 Peachtree Rd., Ste. 650
Atlanta, GA 30309
Ph. 404-892-2931
Fax 404-892-8651
E-mail: ImagesUSA@aol.com
Robert McNeil Jr., President
1 - African-American, Hispanic



USA

**Interviewing Service of America**
16005 Sherman Way, Ste. 209
Van Nuys, CA 91406
Ph. 818-989-1044
Fax 818-782-1309
Michael Halberstam, President
Polly Kleissas, Dir. Int'l. Rsch.
2, 3 - African-American, Asian, Hispanic, Middle Eastern, Native American

Interviewing Service of America, Inc., the largest computer-assisted telephone interviewing marketing research data collection firm on the West Coast, is headquartered in Van Nuys, CA. Now with an office on the East Coast, the firm continues its 12 year history of multi-lingual service to clients in a wide range of industries including health care, transportation, entertainment, high technology, media and telecommunications.
*(See advertisement on p. 69)*

IPC

**IPC International Point of Contact**
32 E. 31 St.
New York, NY 10016
Ph. 212-213-3303
Fax 212-213-3554
Rhoda L. Brooks, Partner
2, 3 - African-American, Asian, Hispanic

Comprehensive market research services specializing in international and domestic foreign language projects. Data collection by telephone, mail or personal interviews in the U.S. or abroad. Call us for your customized research needs. Not limited to large projects. Small, unusual projects accepted.
*(See advertisement on p. 68)*

*JRH Marketing Services, Inc.
29-27 41st Ave. (Penthouse)
New York, NY 11101
Ph. 718-786-9640
Fax 718-786-9642
E-mail: 72114.1500@compuserve.com
J. Robert Harris II, President
1 - African American, Asian, Hispanic, Middle Eastern, Native American

*Juárez and Associates, Inc.
12139 National Blvd.
Los Angeles, CA 90064
Ph. 310-478-0826
Fax 310-479-1863
E-mail: juarez@ix.netcom.com
Nicandro Juárez, President
1 - Hispanic

L.A. Focus
17337 Ventura Blvd., #301
Encino, CA 91316
Ph. 818-501-4794
Fax 818-907-8242
Lisa Balelo, Field Director
Wendy Feinberg, Field Director
1 - African-American, Hispanic

*Leflein Associates, Inc.
8 Millay Ct.
Teaneck, NJ 07666
Ph. 201-801-0159
Fax 201-801-0748
Barbara Leflein, President
1 - African-American, Asian, Hispanic, Middle Eastern, Native American

MACRO AHF
MARKETING RESEARCH AND CONSULTANCY

**Macro•AHF Marketing Rsch. & Consultancy**
100 Avenue of the Americas
New York, NY 10013
Ph. 212-941-5555
Fax 212-941-7031
E-mail: Rhindress@MacroInt.com
Mindy Rhindress, Sr. Vice President
1 - Hispanic

Full-service, custom-designed qualitative/quantitative research. Consumer, executive, business-to-business research; concept and copy testing, positioning, segmentation and tracking studies; mystery shopping and legal research. Full multivariate skills; predictive dialing, 201-station in-house CATI telephone facility or personal outside interviewing. Spacious on-premise conference/focus group center with state-of-the-art video/audio capabilities in both New York and Burlington, VT. Test kitchen. Brochures available.
*(See advertisement on p. 9)*

Mari Hispanic Research & Field Svcs.
2030 E. Fourth St., Ste. 205
Santa Ana, CA 92705
Ph. 714-667-8282
Fax 714-667-8290
Mari Ramirez Lindemann, Owner
2 - Hispanic

**Codes**

1 ............ Full service
2 ............ Data collection/Field service
3 ............ Data processing/software
4 ............ Other (specified)

Next are the general ethnic groups the firm specializes in researching.

*Indicates firms that are owned by an ethnic minority.

*Market Development, Inc.
1643 Sixth Ave.
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
Roger S. Sennott, Vice President/G.M.
1 - Hispanic

Market Research Recruiters
1909 W. Wilson Ave.
Chicago, IL 60640
Ph. 312-769-6268
Fax 312-769-6258
Vito P. Cifaldi, Partner
1 - African-American, Hispanic

*Market Segment Research, Inc.
1320 S. Dixie Hwy., Ste. 120
Coral Gables, FL 33146
Ph. 305-669-3900
Fax 305-669-3901
Gary L. Berman, President
1 - African-American, Asian, Hispanic

**Marketing Matrix**
2566 Overland, Ste. 716
Los Angeles, CA 90064
Ph. 310-842-8310
Fax 310-842-7212
2, 4 (Focus Group) - Hispanic

High-quality service. Care and comfort for all your needs in a professional environment. Highest quality recruiting specializing in medical, legal and technical professionals, entertainment, communications and financial executives, children, Hispanic and general market consumers. Conveniently located just minutes from LAX and near the intersection of major L.A. freeways. Competitive pricing. Large group room with spacious three-tiered viewing room. Cozy one-on-one room with viewing. Private entrance for observers. *(See advertisement on p. 70)*

MBC Research Center
366 Madison Ave.
New York, NY 10017
Ph. 212-599-7400
Fax 212-599-7410
Mary Baroutakis, Partner
1 - African-American, Asian, Hispanic, Middle Eastern

*McLaughlin Research Interviewing Svce., Inc.
1118 Galloway St. N.E.
Washington, DC 20011
Ph. 202-526-0177
Fax 202-526-8747
Alma McLaughlin, Manager
2 - African-American, Hispanic, Native American

*MDI Interviewing Services
1101 Bay Blvd.
Chula Vista, CA 91911
Ph. 619-424-4500
Fax 619-424-4501
José Suárez, Manager
2 - Hispanic

Meadowlands Consumer Center, Inc.
The Plaza at the Meadows
100 Plaza Dr.
Secaucus, NJ 07094
Ph. 201-865-4900 or 800-998-4777
Fax 201-865-0408
Lauren A. Heger, Field Director
4 (Focus Group) - African-American, Hispanic

*Meneses Research & Associates
15000 Ventura Blvd., #200
Sherman Oaks, CA 91403
Ph. 818-784-2192
Fax 818-784-2194
Walter Meneses, President
2 - Hispanic

MGZ Research
5715 Silent Brook Ln.
Rolling Meadows, IL 60008
Ph. 708-397-1513
Fax 708-397-9016
Martha Garma Zipper, Hisp. Qual. Rsch. Cnslt.
4 (Consultant) - Hispanic

National Opinion Research Svcs.
760 N.W. 107 Ave., Ste. 106
Miami, FL 33172
Ph. 800-940-9410
Fax 305-553-8586
Daniel Clapp, President
2 - Hispanic

NorTex Research
1341 W. Mockingbird, Ste. 417E
Dallas, TX 75247
Ph. 214-630-8399
Fax 214-630-6769
Kelly Lynn Ireland, Field Director
2 - African-American, Hispanic

Novasel Associates
67-45 179 St.
Fresh Meadows, NY 11365
Ph. 718-591-7736
Fax 718-591-7386
Judy Novasel, President
1 - African-American, Asian, Hispanic, Middle Eastern, Native American

*Omnitrack Group, Inc.
Davies Pacific Center
841 Bishop St., Ste. 725
Honolulu, HI 96813
Ph. 808-528-4050
Fax 808-538-6227
Alan Ellis, V.P. Asian/Pacific Field Svcs.
1 - Asian

OMR (Olchak Market Research)
7255-A Hanover Parkway
Greenbelt, MD 20770
Ph. 301-441-4660
Fax 301-474-4307
Jill L. Siegel, President
2 - African-American

Opinion Access Corp.
435 Hudson St.
New York, NY 10014
Ph. 212-620-7600
Fax 212-924-9111
Joe Rafael, President
2, 3 - African-American, Hispanic

Paria Group, Inc.
390 W. 800 N., Ste. 104
Orem, UT 84057
Ph. 801-226-8200
Fax 801-226-4819
E-mail: paria@xmission.com
Stephen Zimmerman, President/CEO
2, 3 - African-American, Asian, Hispanic, Middle Eastern, Native American

Perceptive Market Research, Inc.
2306 S.W. 13th St., Ste. 807
Gainesville, FL 32608-2001
Ph. 904-336-6760 or 800-749-6760
Fax 904-336-6763
E-mail: 102403,203@compuserve.com or pmr@freenet.ufl.edu
Dr. Elaine M. Lyons-Lepke, President
1 - African-American, Asian, Hispanic

Phase III Market Research
1150 N. First St., Ste. 211
San Jose, CA 95112
Ph. 408-947-8661
Fax 408-293-9909
Nancy Pitta, President
2 - Asian, Hispanic

Prange & O'Hearn, Inc.
Marketing & Research Group
6401 S.W. 87 Ave., Ste. 120
Miami, FL 33173
Ph. 305-271-8788
Fax 305-271-9448
Randy Prange, CEO
1 - Hispanic

QMark Research & Polling
Pacific Tower
1001 Bishop St., 19th fl.
Honolulu, HI 96813
Ph. 808-524-5194
Fax 808-524-5487
Barbara Ankersmit, President
1 - Asian

QualiData Research, Inc.
170 Garfield Pl.
Brooklyn, NY 11215-2106
Ph. 718-499-4690
Fax 718-499-0576
Hy Mariampolski, Ph.D., Principal
1 - African-American, Asian, Hispanic, Middle Eastern, Native American

## Codes

1 ............ Full service
2 ............ Data collection/Field service
3 ............ Data processing/software
4 ............ Other (specified)

Next are the general ethnic groups the firm specializes in researching.

*Indicates firms that are owned by an ethnic minority.

*Recruiting Resources Unlimited
131 Beverley Rd.
Brooklyn, NY 11218
Ph. 718-435-4444
Fax 718-972-3926
Connie Livia, President
2 - African-American, Asian, Hispanic, Middle Eastern

Research Resources
8800 N. 22nd Ave.
Phoenix, AZ 85021
Ph. 602-371-8800
Fax 602-906-3270
E-mail: winonap@primenet.com
John L. Muller, Exec. V.P.
1 - Hispanic

Reyes Research
253A Esplanade Dr.
Oxnard, CA 93030
Ph. 805-278-1444
Fax 805-278-1447
Arvind Datta, Manager
2 - African-American, Hispanic

*Rizzo Research International, Inc.
156 Fifth Ave., #701
New York, NY 10010
Ph. 212-260-0790
Fax 212-982-1984
Roberto Rizzo, President
2, 4 (Focus Group) - African-American, Asian, Hispanic, Middle Eastern, Native American

*Roslow Research Group, Inc.
16 Derby Rd.
Port Washington, NY 11050
Ph. 516-883-1110
Fax 516-883-4130
Peter Roslow, President
1 - Hispanic

San Diego Surveys
4616 Mission Gorge Pl.
San Diego, CA 92120
Ph. 619-265-2361
Fax 619-582-1562
Jean Van Arsdale, President
1 - Hispanic

Lynn Sarkany & Associates
1417 Raymond Ave.
Glendale, CA 91201
Ph. 818-552-2120
Fax 818-552-2707
Lynn Sarkany, President
1 - Hispanic

Lee Slurzberg Research, Inc.
379 Windsor Rd.
Englewood, NJ 07631
Ph. 201-567-2265
Fax 201-567-5661
Lee Slurzberg, President
1 - African-American, Hispanic



*Southern Spectrum Research, Inc.
1600 Canal St., Ste. 400
New Orleans, LA 70112
Ph. 504-539-9222
Fax 504-539-9228
Linda DeCuir, Office Manager
2, 3 - African-American, Asian, Hispanic

*Strategic Directions Group, Inc.
119 N. Fourth St., Ste. 311
Minneapolis, MN 55401
Ph. 612-341-4244
Fax 612-341-4127
Carol Morgan, President
1 - Hispanic

Strategy Research Corp.
100 N.W. 37th Ave.
Miami, FL 33125
Ph. 305-649-5400
Fax 305-649-6312
Jim Loretta, Sr. Vice President
1 - Hispanic

*Ray Suh & Associates, Inc.
12 Perimeter Park Dr., Ste. 101
Atlanta, GA 30301
Ph. 770-986-9267
Fax 770-986-9485
Ray Suh, Principal
1 - Asian

SuperDatos

**SuperDatos de México**
61 Ensenada
Colonia Hipodromo
Mexico City, Mexico 06100
U.S. Ph. 800-800-5055
U.S. Fax 415-392-7141
Rich Anderson
1 - Hispanic

SuperDatos de México provides a wide range of quantitative and qualitative research services throughout Mexico, including central location intercept interviewing, telephone interviewing, data tabulation and analysis, focus group recruiting, moderation and analysis. New, state-of-the-art focus group facility. The finest in Mexico.
*(See advertisement on p. 71)*

## ▪ Survey Methods Group

**Survey Methods Group**
140 Second St., Ste. 400
San Francisco, CA 94105
Ph. 415-495-6692
Fax 415-995-8185
Linda Rynazewski, V.P. Marketing

Forty CATI station telephone center specializing in multilingual, sensitive subject, high response studies for health care, social marketing, customer satisfaction. Nationwide recruitment of hard-to-reach respondents for focus groups.
*(See advertisement on p. 71)*

Survey Sampling, Inc.

**Survey Sampling, Inc.**
One Post Rd.
Fairfield, CT 06430
Ph. 203-255-4200
Fax 203-254-0372
Terrence Coen, V.P. Sales & Marketing
4 (Sampling) - African-American, Asian, Hispanic

Leading source for statistically accurate and cost efficient samples for telephone, mail and door-to-door survey research. SSI's New Software, SSI-SNAP™ lets you place sample orders using your own PC and modem! Target race/ethnicity, income, age, low-incidence groups, and businesses. Partners with researchers since 1977.
*(See advertisements on pp. 20, 30, 63)*

Surveys Unlimited
Div. of Horowitz Assoc.
1971 Palmer Ave.
Larchmont, NY 10538
Ph. 914-834-6564
Fax 914-834-5998
Alisse Waterston, Ph.D., President
1 - African-American, Hispanic, Middle Eastern

*Target Market Research Group, Inc.
5805 Blue Lagoon Dr., Ste. 185
Miami, FL 33126-2019
Ph. 800-500-1492
Fax 305-262-0372
Martin G. Cerda, President
1 - Hispanic

***Technometrica, Inc.**
85 Kinderkamack Rd.
Emerson, NJ 07630
Ph. 201-986-1288
Fax 201-986-0119
Ravi Iyer, Executive President
1 - African-American, Asian, Hispanic, Middle Eastern, Native American

Technometrica, Inc. is a Northern New Jersey-based full service research firm providing turnkey services for both qualitative and quantitative research. Our emphasis on in-house completion of all tasks allows us to maintain strict standards of quality control, timely deliverables, and competitve pricing. We are experienced in designing, conducting and analyzing all forms of research, including on-line in Internet surveys, telephone surveys, mail surveys, intercepts and focus groups. Our analysis goes beyond simple measurement - we provide our clients with actionable recommendations based on expert analysis of the data.
*(See advertisement on p. 7)*

*V & L Research and Consulting, Inc.
4294 Memorial Dr., Ste. D
Decatur, GA 30032
Ph. 404-298-0139
Fax 404-298-0026
Delphyne Lomax, Principal
1 - African-American, Asian, Hispanic, Middle Eastern, Native American

Venture Marketing Associates, Inc.
3155 Hickory Hill Rd., Ste. 203
Memphis, TN 38115
Ph. 901-795-6720
Fax 901-795-6763
Alex Klein, President
1 - African-American, Hispanic

*Visual Research Communications
61 Pearl St.
Metuchen, NJ 08840
Ph. 908-906-6556
Fax 908-906-6558
1 - Hispanic

*The Winters Group, Inc.
14 Franklin St., Ste. 920
Rochester, NY 14604
Ph. 716-546-7480
Mary-Frances Winters, President
1 - African-American, Asian, Hispanic, Native American

## From the Publisher

continued from p. 42

• The variety of industries using mystery shopping has increased dramatically during the 1980s and '90s, leading to a proliferation of firms offering the service. Unfortunately, not all of them have the experienced personnel to provide top-level service. In addition, some unethical firms seriously damage the image of mystery shopping by selling "mystery shopping training kits" to consumers, with the implied promise that the information provided is necessary for the individual to be considered as a mystery shopper.

• Clients' need for fast turnaround is increasing. In some cases local managers are receiving in-store interview results in a day. In that way clients can micromanage their business and correct problems quickly.

• It is important for employees to be aware that the firm is conducting mystery shopping and that their performance is being monitored to improve service and satisfaction, not to spy on them for the purposes of punishment. Tying incentive programs for outstanding performance to mystery shopping efforts create a positive atmosphere. The incentives need not be monetary.

• Clients should ask about industry experience when interviewing prospective service providers. Within the mystery shopping field companies tend to develop areas of expertise. Each client and each industry is unique — shopping banks is much different than going into fast food restaurants — so make sure to find out about the firm's areas of expertise.

• It is likely that mystery shopping firms will be asked to work for competing firms. The experts I spoke with see no problem with doing so as long as the firms involved are aware of the situation and give their approval. If it becomes necessary to competitively shop one of their clients they should notify the client of the situation.

Most mystery shopping companies will shop their clients' competition. While this may make some companies nervous, it's a necessary situation and one that actually is beneficial because it allows clients and mystery shopping firms to develop industry norms.

• Mystery shopping firms must have knowledge of legal guidelines for each state in which mystery shopping takes place and make the client aware of the ramifications, particularly if reports might be used to evaluate employee performance.

• Every client seems to have unique needs. While many questionnaires contain identical questions almost every client asks for specialized information not requested by other clients in the same field or industry. The same holds true for the reporting of results.

• A key to the success of a mystery shopping program is selecting the correct shoppers. The profile of the mystery shopper should match that of the client's customer. To meet this criteria the mystery shopping company should have developed a large database of thousands of potential shoppers, enough to eliminate those who might have biases due to present or previous employment or other impediment.

• Shoppers must be properly trained and understand the objectives of the project. Proper training means that evaluations should not vary from one location to the next and will be similar regardless of the geographic area shopped. Having a large pool of mystery shoppers available ensures that they will not be recognized.

All of the folks I spoke with agreed that the future looks bright for mystery shopping. Continued growth is expected in the U.S. and rapid expansion will be occurring internationally because companies are seeking to establish global standards to provide consistency throughout the world. That way, fast food patrons can one day expect the same level of cleanliness in Moscow, Russia and Moscow, Idaho. ❑

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