

*Quirk's*

January 1997

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## ***Mystery shopping issue***

- ***Secret shoppers keep Yamaha digital pianos top of mind with salespeople***
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# C O N T E N T S



Volume XI, Number 1

January 1997

Mystery shopping is a useful research tool that helps retailers gauge the effectiveness of their sales staff. Photo by PhotoDisc, Inc. © 1995

Correction: Due to an editing error, the photo credit for the cover of the December issue was accidentally omitted. The photo was supplied by Fieldwork, Inc., Chicago.

## FEATURES

- 10 **Right on cue**  
*Mystery shopping makes sure salespeople sing praises of Yamaha digital pianos*
- 12 **Patterns revealed: the evolution of a mystery shopping program**
- 14 **Taking the mystery out of mystery shopping**
- 16 **War Stories: True-life tales in marketing research**
- 18 **Mystery shopping scams hurt researchers, consumers**
- 22 **Student research teams: better than the real thing**
- 27 **Remember the ladies**  
*Why marketers should care about reaching women on-line*
- 31 **Testing product innovations: a case history**
- 33 **Mystery shopping 101**
- 54 **1996 QMRR Story Index**

## DEPARTMENTS

- |                            |   |
|----------------------------|---|
| 6 Survey Monitor           | 55 1997 Directory of Mystery Shopping Firms |
| 8 Product & Service Update | 72 Classified Ads/Corrections               |
| 20 Names of Note           | 73 Index of Advertisers                     |
| 21 Research Industry News  | 74 Trade Talk                               |
| 48 Moderator MarketPlace   |   |

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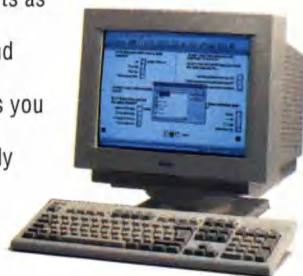
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# Survey Monitor

## U.S. products rank high among Latin Americans

Latin American consumers seem highly pre-sold on key categories of American products. Consumers of the region's major markets gave U.S. products consistently high marks for quality and price in a segmentation study, the MDI COMPASS, conducted by Market Development, Inc., a San Diego research firm.

A total of 2,000 adults in Argentina, Brazil, Chile and Mexico were asked their perception of the quality and price of automobiles, breakfast cereal, beer, casual clothing, toys, large appliances, wine and electronic equipment (TVs, VCRs) from the United States, Japan, the European Economic Union (EU) and their own countries.

COMPASS results clearly reveal Latin American consumers' high levels of receptivity to American products. Introduction of new U.S. brands to the region's marketplace can benefit from the positive equity American brands already enjoy.

In ranking best overall quality/lowest price, American products were perceived to be the best or next best in seven of the eight categories. American toys, casual clothing and major appliances were rated the best among Latin consumers.

COMPASS respondents considered American major appliances (refrigerators, washing machines, etc.) as offering the best price/value in their markets. In fact, those polled thought U.S. appliances were less costly than those made

domestically. Japanese-made appliances, though regarded as above average in quality, were perceived as somewhat expensive. EU-made appliances got the most unfavorable quality/price rating, ranking significantly lower in quality than even domestic appliances.

Casual clothing, which includes jeans and athletic footwear, was another category in which American goods were highly esteemed. The perception of the quality of domestic casual clothing was also high. The EU and Japan were a distant third and fourth, respectively,

with the casual clothing products of both offering less favorable price/value than their U.S. and domestic counterparts.

Overall, the quality of Japanese-made cars was only slightly more highly regarded than U.S. makes. Respondents did note the comparatively lower cost of American cars. Autos manufactured in the EU are perceived as expensive and of lower quality.

As might be expected, Japan's TVs and VCRs are perceived as the better

continued on p. 35



## One-third of households using cellular phones

Almost one-third (32.3 percent) of American households now have cellular telephones in their home or car, according to a recent nationwide survey by Decision Analyst, Inc., Arlington, Texas.

The survey of 9,400 households found that personal cellular phones are used most widely by those 45 to 54 years old (39.2 percent of respondents). Cellular phones are used least often by those 55 and older (22.2 percent of respondents).

Cellular phones are most widely used by those earning \$40,000 or more (45.9 percent of respondents). Likewise, cellular phones are used most commonly by those with postgraduate degrees (41.5 percent of respondents).

Some interesting geographical differences exist. Personal cellular telephones are found most widely in the South (35.3 percent of residents) and least often in the Northeast (29.3 percent of residents).

"The high penetration of higher income households by cellular phones suggests that the cellular market will continue to grow rapidly. With a third of all individuals using cellular phones, the potential exists to reduce crime (because of widespread and quicker calls to police). Similarly, overall economic efficiency is theoretically improved because business can be conducted anywhere at anytime with no delays," says Jerry W. Thomas, president/CEO of Decision Analyst, Inc.

"The higher usage levels of cellular phones in the South is probably the result of aggressive marketing by mobile phone companies in that region," says Thomas.

The national survey of cellular telephone usage has a margin of error of  $\pm 1$  percent. For more information call Jerry W. Thomas at 817-640-6166.



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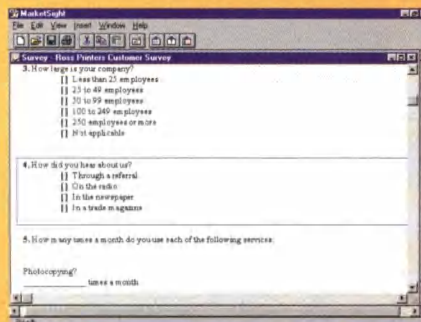
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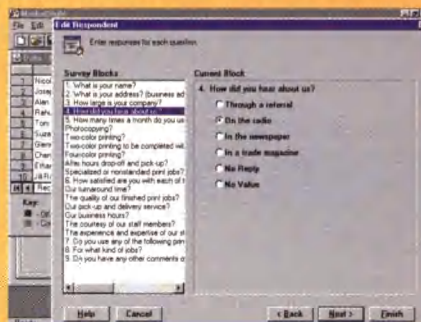


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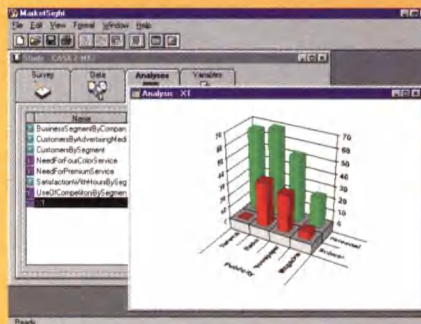
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# Product & Service Update

## In-Touch touches down in U.S.

In-Touch Survey Systems of Ottawa, Canada, has entered the U.S. market with its electronic data collection kiosks and hand-held electronic clipboards. This approach provides clients with actionable information in as little as 48 hours. It is designed for chain store retailers, banks, restaurants and other service businesses that seek to develop an index of customer loyalty, test a new product, measure the effectiveness of a marketing campaign or compare performance levels across many locations.



It is also suitable for confidential surveys of employees. For more information call 613-247-7222 or visit the company's Web site at <http://www.intouchsurvey.com>.

## Equifax NDS updates Web site, Infomark for Windows

Equifax National Decision Systems, San Diego, has a newly animated and interactive Web site at <http://www.ends.com>. Marketers who visit the site can experience consumer segmentation firsthand by entering a ZIP code and playing "The Lifestyle Game." The game showcases the MicroVision lifestyle segmentation system. After entering the ZIP code, visitors will see photos and descriptions of the three most dominant MicroVision segments in that ZIP code. The site spotlights all of Equifax National Decision Systems' data and software products. A special feature called Fast-Facts provides current data tidbits from the company's more than 65 databases, ranging from demographic to business to consumer demand data for a variety of products.

The company has also introduced version 7.0 of Infomark for Windows, its desktop marketing workstation. New features make it simple to integrate a company's own internal databases into the decision support system and to produce reports. Infomark's new Microsoft Open Database Connectivity interface allows customer databases to be linked directly to Infomark, speeding integration with demographic, lifestyle segmentation, business, consumer expenditure and other Equifax NDS marketing information. For more infor-

continued on p. 40



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**Right**



***on cue***

*Mystery shopping makes sure salespeople sing praises of Yamaha digital pianos*

By Joseph Rydholm  
QMRR editor

## Mystery shopping

For most marketers, mystery shopping means sending consumers to a retail outlet to check on service issues like employee attitude and store appearance. But mystery shopping can be used for many other purposes, including boosting product awareness. For example, Yamaha Corp. of America, a Buena Park, Calif., maker of musical instruments, uses a mystery shopping program to stimulate interest in and sales of its line of Clavinova digital pianos.

When the product was introduced in 1985 it was an innovation, an electronic piano with weighted keys and digitally sampled sounds to match the feel and tone of a “real” piano.

As a leader in the new piano market, Yamaha saw the Clavinova line as a way to grab a share of the much larger used piano market while not competing against itself for new piano customers. The digital pianos’ reasonable price points make them an option for consumers who may be seeking a used piano because they think a new one is unaffordable.

“The market for new pianos is approximately 100,000 pianos a year,” says Jim Lynch, assistant general manager of the Keyboard Division of Yamaha. “The used piano market is 500,000 per year. Not all of those are sold — some are passed between family members — but a lot of retail stores get customers who say they’re interested in a used piano. We felt if we could get those customers to look at a Clavinova, we’d sell a lot of product, so that’s how the secret shopper program started.”

### Gist is simple

The gist of Yamaha’s secret shopper program is simple and hasn’t changed since the program was introduced several years ago. The shopper enters the music store and tells the salesperson that he or she would like to see a good used piano. The salesperson is free to show them a used piano — that is, after all, ostensibly why they’re there — but if the first new piano they demonstrate for the customer is a Clavinova they are immediately given a check for \$100 and told that they’ve “won.”

“It’s important to give the money to them on the spot. It’s a completely different thing to say, ‘You’re a winner and we’ll mail you the check,’ as opposed to handing it to them

right there. It generates a lot more excitement,” Lynch says.

“When we first started doing this program the salespeople who won would get so excited that they’d call us. They don’t do that so much anymore but it still creates a lot of positive effects. For example, if the secret shopper visits a chain store

***“Yamaha wanted to find out what dealers were saying about the Clavinova. Is it number one on the salesperson’s mind? Do they tout it as being the best? Any manufacturer spends a good deal of money with the retail trade trying to stimulate interest in their brand, trying to get the channel to say something positive about their brand and sell it ahead of everyone else’s.”***

and someone wins, the salesperson will often call their friends in two or three stores and at that point we feel that the Clavinova gets a lot of attention that it might not have gotten otherwise, for a low cost.”

If the salesperson doesn’t show the shopper a Clavinova, the shopper is instructed to terminate the interaction quickly, without revealing their identity as a secret shopper. “If the

continued on p. 41

# *Patterns revealed: the evolution of a mystery shopping program*

By Donna Garrou



*Editor's note: Donna Garrou is vice president of sales and marketing for Shop'n Chek, an Atlanta mystery shopping firm.*

**U**rban legends are those wonderfully fantastic tales that travel through society only because they possess just enough credibility to make people wonder if they might actually be true, or because they grow more fascinating with the passage of time. Our company, Shop'n Chek, has an urban legend that illustrates the process that many organizations go through once they decide to institute a mystery shopping program. Incredible as it may seem, the following story is true.

A few years ago, a potential client listened with interest to a presentation on how the development and institution of a mystery shopping program at his company could boost service levels and performance. Since he couldn't be out in the field, constantly checking the performance of his employees, he welcomed the evaluations of experienced shoppers.

He appreciated the effort involved in finding shoppers who mirror his client base and understood the importance of questionnaire design. But then the client heard something that troubled him. He was told that one of the key elements involved in a successful program is communication and feedback to the front line — essentially telling employees that the mystery shopping program is in place. This includes explaining to employees why certain questionnaire elements are important and how each question is evaluated, and using the shopping program as a motivational tool. The client pondered this for a moment, looked quite puzzled, and asked, "But if I tell my employees they are being shopped — if I take the mystery out of it — then everyone will score 100 percent!" If only it were that simple.

In reality, mystery shopping is a proven form of customer-oriented research which provides hard, quantifiable data on service performance levels. Unfortunately, simply gathering the data does not lead to improvements. An organization can be presented with the most detailed graphs and the most illuminating summaries of results, but if it is unwilling to accept the validity of data that results from a well-designed mystery shopping program and use that information as a tool to improve service, the effort is wasted.

In Shop'n Chek's 24-year history and my personal experience working with clients for over 13 years, certain patterns can be observed when new programs are implemented. By closely examining and tracking these patterns, Shop'n Chek management has begun to see that they are actually a key part of a successful mystery shopping program's evolution.

Often clients become discouraged initially as their program goes through the stages described below. Before changes

in service delivery become noticeable to customers, the client's own organization must embrace the program and use it to achieve those improvements.

The patterns or stages of a mystery shopping program exist almost regardless of the program type. These stages, while not scientific, are surprisingly predictable. The actual progression of these stages or patterns varies depending upon the organization's previous experience (if any) with mystery shopping, how well the program is presented to the client's field organization, and the type of performance incentives that are established.

The number one factor behind the acceleration of this process is that the program be top-driven. Without the support and enthusiasm of top management, no service evaluation program will be effective. Organizations must realize that a shopping program is instituted in order to determine what management is doing wrong in the selection, training and motivation of employees — not what specific employees are doing wrong. If employees are not meeting performance expectations, it usually means they are confused about what is expected of them. Alleviating this confusion is management's responsibility — taking the mystery out of the process.

### **Stage 1: denial**

The first stage for many organizations following initiation of a mystery shopping program is denial — meaning there is little or no acceptance that the results are accurate. How often has a store manager lamented after initial results are delivered: "It's impossible to believe that my cashier didn't thank the customer. We have training sessions on that and all my people do it! If only they hadn't shopped me on Saturday. If the company knew anything about retail they would know it's not fair to evaluate me then!" Criticism at this stage often centers around company management, the mystery shopping company, the shopper base and the selected scenarios. There are a number of reasons for this denial stage, including:

- previous experience with poor quality mystery shopping providers;
- general suspicion of corporate programs;
- poor communication regarding how the program results will be utilized;
- blaming poor results on a "bad day" or "bad employee."

Another contributor is the often completely unexpected nature of the results, as Unibanco, one of Brazil's largest banks, can attest. As a client of Indicator, a Shop'n Chek licensee, Unibanco has utilized mystery shopping programs for six years. Their biggest surprise the first year? Tellers were not wearing name badges even though company policy

*continued on p. 42*

# Taking the mystery out



## of mystery shopping

By Mark L. Michelson

*Editor's note: Mark Michelson is president/CEO of Michelson & Associates, Inc., an Atlanta marketing research company.*

**O**ver the past few years it seems everybody has become consumed with mystery shopping. Companies, consumers and service providers are more involved with it today than ever before.

Mystery shopping is known by many names: secret shopping, performance evaluations, service monitoring, anonymous customers, quality auditing, service investigations, trained consumers, service checks and frontline evaluations, to name a few.

No matter what it's called, mystery shopping is an evaluation of the shopping/buying process provided by trained shoppers who know in advance what they are to evaluate. Mystery shoppers visit or call businesses posing as ordinary customers and provide detailed evaluations of their experience using written reports or questionnaires.

Mystery shopping provides companies with a means of monitoring service from the consumers' perspective. It lets management be the proverbial fly on the wall. Mystery shopping is used in a wide variety of industries such as retail, manufacturing, hospitality (hotels, restaurants, resorts), property management, multi-family housing, banking/financial,

gas station and convenience store, entertainment, travel, utilities, business-to-business, even medical.

Mystery shopping is not new. It got its start over 50 years ago as a way to check on employee integrity and minimize theft primarily in the financial services industry. For several decades now, companies have been using mystery shopping to evaluate employee service and sales performance, monitor pricing and product quality, keep an eye on the competition and ensure compliance with industry and government regulations. Today many progressive companies integrate mystery shopping with employee training/incentive programs and customer satisfaction measurement.

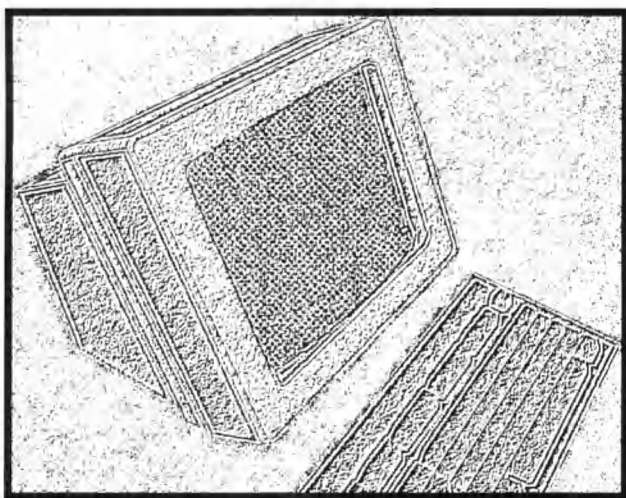
So why the sudden interest in mystery shopping? It may be attributed to any of the following: a decline in the quality of customer service; the growth of chain stores; competitive pressures; and the fact that more companies are promoting mystery shopping services. Perhaps it seems more popular now because companies are getting positive, tangible and actionable results with their programs.

For companies in competitive industries where product pricing and assortment are no longer unique selling propositions, customer service is often the key to success or failure. Consider the following well known marketing mantras:

- Why customers leave

continued on p. 44

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# 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.*

**P**olitical pollster Arnie Steinberg, speaking at an American Marketing Association meeting, reported that in one of his surveys consumers were asked on an aided basis which of the potential candidates for senator they were aware of. One consumer indicated that he had heard of none of the candidates, who included the current senator of the state, a former vice president of the United States and several other luminaries. Later in the survey, when asked what was the greatest problem facing the nation today, the same respondent replied, "Apathy."

Market research interviewers always record responses verbatim don't they? Ask that of a certain researcher, who prefers anonymity, who tells about reading the recorded response to one of the open-end questions in his study. "None of my business," the questionnaire said.

Sometimes interviewers are not quite properly trained, or do not have common sense. An unnamed researcher at an unnamed upscale women's apparel retailer tells about reporting to work one morning at one of their stores to brief an interviewer for a customer exit survey. The interviewer, in her early 20s, showed up in a racy outfit that didn't quite mesh with the clothing preferences of the store's target group—although the interviewer's black mesh stockings did mesh with the rest of her outfit! Needless to say, the interviewing was cancelled for that day.

Marketer Peter Rich of Lois/EGL recalls a time early in his career when he was involved with home placement of a frozen product. He was at the airport at a central California city, awaiting delivery of the product, which was packaged in a special version of dry ice to keep it from spoiling. Along with the product, also being transported in the baggage hold on that flight was a dog who'd just won Best in Show at the Westminster Kennel Club. When the flight arrived it was soon determined that the product apparently wasn't packed properly — the fumes emanating from it had taken the dog's life.

Rich always wanted to be a killer marketer, but not that way.

Saul Cohen of Saul Cohen & Associates reports preparing for a focus group in a facility with multiple rooms. It was the practice of the facility management to place a sign with the moderator's name on the door of each viewing room. While in the hallway preparing for his own group, which hadn't yet begun, Cohen noticed a man dash out of the room where one session was underway. The man, obviously in a great hurry, quickly strode down the hall, unzipping his fly to save every second, and thrust open the door with the sign "JOHN" on it.

A few seconds later, the man exited the room apologetically, zipping up his pants, having just encountered the disbelieving stares of the clients observing the session he was a participant in.

Joyce Rachelson of Computers for Marketing recalls a time over 20 years ago — the days of keypunch cards and countersorters — when she was working for a major advertising agency. She was tabulating the results of an awareness question on a personal care product, where consumers were asked which brands they were aware of. The project analyst requested a tabulation of the number of people who had a 1 and a 2 and a 3 punch. Rachelson dutifully supplied this. Then the analyst requested a tabulation of the number of people who had a 2 and a 1 and a 3 punch as well as a tabulation of the number of people who had a 3 and a 1 and a 2 punch. Rachelson told her that in both cases, the answer was the same as the number of people who had a 1 and a 2 and a 3 punch.

"No it isn't," insisted the analyst. "I asked for them in a different order."

Rachelson reports it took three hours of conversation and running the cards through the machine to convince the analyst that no matter what order, the answer would always be the same.

She further reports that the analyst was soon promoted to a vice presidency.

In future issues, we'll report on more quirky, loopy and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please call me at 818-782-4252 or, better yet, write it up and fax it to me at 818-782-3014 or E-mail me at [artshulman@aol.com](mailto:artshulman@aol.com). □





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## Mystery shopping scams hurt researchers, consumers

By Mark L. Michelson



*Editor's note: Mark Michelson is president/CEO of Michelson & Associates, Inc., an Atlanta marketing research company.*

**B**eware of mystery shopping employment fraud. Recently mystery shopping has become a popular target of scam operators. This past summer we saw numerous advertisements for mystery shoppers to earn incredible income such as \$347 a week or \$24,000 a year. In addition, there are several books being sold that list marketing research companies and give consumers "advice" on how they can earn a living as a mystery shopper or professional focus group participant. These books and advertising schemes promise much more than what can realistically be earned by the average consumer, and in some cases advertisers are charging people for this information without their knowledge. These fraudulent activities can damage our reputation as an

industry and affect everyone's ability to recruit shoppers.

One of the most notorious of these scam operators has advertised in numerous newspapers throughout the country. Because of their widespread advertising, it is no longer possible to place ads for mystery shoppers in many newspapers. These swindlers

ran classified ads that asked people to call a local number for information on mystery shopping opportunities. Once people called this number, they were told to call another number using a special international access number to reach area code 809. They were told there would be no additional expense other than the cost of a normal

long distance call. In fact, calling this number cost unsuspecting consumers at least \$30 and as much as \$100.

Callers heard a recorded message that lasted over 20 minutes and provided unrealistic information on mystery shopping opportunities and listed the names and addresses of 17 companies that hire mystery shoppers. All but one of these companies were listed without their knowledge or permission.

Obviously, people have a desire for the type of part-time work that mystery shopping offers, and they are very interested in the

### How to identify a scam

- ➔ **The consumer is promised unrealistic earnings such as \$347 a week or \$24,000 a year or the ability to get free big-ticket merchandise.**
- ➔ **Consumers are not made aware of charges made to their phone bill.**
- ➔ **Consumers are promised ongoing income opportunities for a fee, not temporary part-time work.**

continued on p. 47

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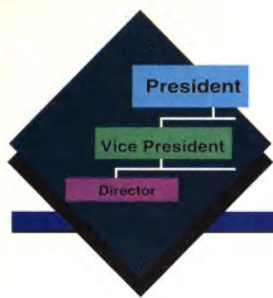
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# Names of Note

**Melinda Dyer-Martin** has joined *Meldrum & Fewsmith Communications*, Cleveland, as vice president, account planner.



**Dyer-Martin**      **Kime**

**Melissa Kime** has joined *Edge Healthcare Research, Inc.*, Nashville, as a project coordinator.

*SDR, Inc.*, an Atlanta research firm, has added 10 staffers to expand its consulting and advanced analytics team. **Jay Weiner**, **Steve Ballou** and **John Wurst** have joined the firm as senior consultant, research methods.

**James McGee**, **William Randall Clark**, **Brian Griner** and **Reba Copeland** have been named senior research associate. And **Leslie Jones**, **Sheila Hall** and **Joe Utz** have been named research associate.

**George Fabian** has retired as full-time director of *Audits & Surveys Worldwide's* International Division. Fabian will serve ASW on a part-time basis as a liaison to ASW's international clients and affiliates. **Allen Khorami** has been named the new International Division director.

*VMI Communications & Learning Systems, Inc.*, a Chicago firm providing international copy testing and market research, has added several new staffers: **Vincent Bitetto** has been named marketing and public relations coordinator; **Elizabeth Lydon** has been named project manager; **Randal Ries** has been named

research analyst/new project coordinator; **Frank Bavaro** has been named data processing/database coordinator; and **Todd Gustafson** has been named senior manager of quantitative research.

**Kate Stubbs** has been named global research director at *The BrainWaves Group*, New York City, an independent consulting and research subsidiary of The MacManus Group.

**Jack Ward** has joined *Marketing Leverage, Inc.*, Glastonbury, Conn., as senior consultant.

**Mike Itashiki** has been promoted to marketing research manager at *Lyrick Studios* in Richardson, Texas, producer of TV shows "Barney & Friends" and "Wishbone."

*Hispanic & Asian Marketing Communication Research*, Belmont, Calif., has added **Carolina Echeverria** and **Horacio Segal** to its staff of qualitative researchers.

**Bruce Hall** has joined *Howard, Merrell & Partners*, Raleigh, N.C., as vice president and director of marketing analysis.

**Paul Root**, president of the *Marketing Science Institute*, Cambridge, Mass., has been named to the advisory board of the University of Texas at Arlington's master of science in marketing research degree program.

**Gregory Wills** has been named vice president and senior consultant for St. Louis-based *Aragon Consulting Group, Inc.*

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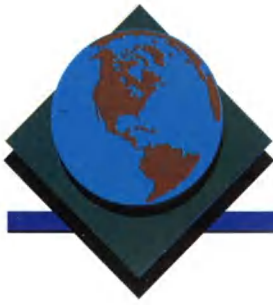
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# Research Industry News

The American Marketing Association and The Wharton School announce the annual call for nominations for the **Charles Coolidge Parlin Award**. The award was established in 1945 by the Philadelphia Chapter of the AMA and The Wharton School in association with the Curtis Publishing Company to honor academics and practitioners who have demonstrated outstanding leadership and a sustained impact on advancing research over an extended period of time. This impact might be reflected in one or more of the following ways: new concepts, methods and models for measurement and analysis that expand the capabilities of organizations to achieve a better understanding of markets, customers and consumers; creative integration of existing methodologies and an understanding of information needs resulting in more widespread use and/or appreciation of marketing research; demonstrated leadership resulting in stimulating the effective use and value of marketing research and market based knowledge. All nominations must include: the nominee's full name, title, address and phone num-

ber; a description of the work done by the nominee that qualifies them for the award; the full name, title, address and phone of the person making the nomination. Nominations should be submitted by March 1, 1997, to Patricia Goodrich, director, Marketing Research Division, American Marketing Association, 250 South Wacker Dr., Suite 200, Chicago, Ill., 60606. Phone 312-831-2721. Fax 312-648-4619.

**Tulsa Surveys** has a new facility at 4928 S. 79th E. Ave., Tulsa, Okla., featuring larger rooms, new recording equipment, seating for respondents and clients and easy access to airport and hotels. For more information call 918-665-3311.

**AFFINA Corp.**, a Troy, Mich., research firm, has been chosen by Hewlett-Packard to help it evaluate and improve the quality of sales and service support provided to resellers of HP equipment. The company has also been chosen by the United States Postal Service to help it assess the potential for marketing products over the World Wide Web via the USPS

Internet site.

**Elrick & Lavidge** has entered into a strategic partnership with INRA (Europe) — an international research group owned in majority by Sample Institut with its coordination office in Brussels — and Haug International of Los Angeles to provide global marketing information services. The combined partnership will have revenues in excess of \$200 million, offices in 23 countries and a staff of over 1,200. Key terms of the agreement include the development of joint syndicated or continuous research products and services and the exchange of custom research projects between the U.S. and Europe.

**Remedy Research**, a division of Rx Remedy, Inc., a Westport, Conn., marketing and publishing firm, has announced plans to launch the largest-ever study of the impact of osteoporosis on mature Americans. Beginning this month, a detailed survey will be sent to 30,000 osteoporosis sufferers selected from the Remedy Consumer Healthcare database,

continued on p. 72

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# ***Student research teams: better than the real thing***

By Tim Huberty

*Editor's note: Tim Huberty has taught Applied Marketing Research at the Graduate School of Business of the University of St. Thomas in St. Paul since 1988.*

**B**udget cutbacks. Downsizing. Time constraints. Trying to keep up with the latest techniques, latest technologies. How can a research manager get anything done anymore?

If this situation sounds familiar to you, you may want to consider tapping a valuable resource: students from the marketing research classes at your local college or university.

It's a relationship made in research heaven: They need you as much as you need them. During my 10-year tenure as an adjunct faculty member, I've supervised over 100 teams with over 70 different clients. Almost every company that has worked with a team of students has proclaimed it to be one of the most valuable experiences they've ever had. These clients have ranged from Fortune 500 companies like Northwest Airlines, 3M and General Mills to small entrepreneurs hoping to make their first million by finding customers for their latest invention.

### **Benefits for students and clients**

The advantages far outweigh the disadvantages. Students have much more time and energy than you'll ever have. In some ways, the stakes for them are also higher. In addition to the

obvious grade, they're vying for something much more valuable, something money can't buy: experience. (You're only working for a paycheck.) There's nothing more impressive on a résumé than noting that you have worked for a real client on a real marketing research project. The final written report is also something a student can take with them on a job interview. Several students have used these courses as meal tickets. In fact, I've hired several myself. "Marketing research textbooks are worthless," says Paul Nicholas, marketing director at Minneapolis-based Vaughn Communications. "You just can't beat this kind of experience. You have to live it to learn it."

On the first day of class, my students are given a simple challenge: "Do it better than a supplier. If you do, you'll get an A. If not, you won't." That challenge becomes the motivation through four long months of hard work. Essentially, these students become a marketing research company — writing a proposal and questionnaire, overseeing the fieldwork, analyzing and interpreting the data and writing the final report as well as presenting results to the client.

For the client, the benefits include a real-world refresher course that's better than any high priced seminar at a fancy resort in the middle of January. The students' inquisitiveness rejuvenates a research manager like nothing else can. Suddenly, everyday assumptions and habits are called into question. "Why *do* we do it that way?" Nothing is more valuable than

looking at one's job from a new perspective. "I can't believe how much I've learned from the students," says Dave Bonko, marketing director at Pro Insignia, Eagan, Minn. "We also have the opportunity to evaluate new product opportunities and try out new marketing research techniques."

Notice that cost wasn't one of the first items mentioned. Companies do save money, but oftentimes these savings are overshadowed by the benefits listed previously. Rule of thumb: Students can save up between 25 to 50 percent on the cost of a project — much, much more if one tries to figure out how much a real-world supplier would charge for hundreds of hours of developmental and analytical time.

One of the greatest rewards comes at the end of the semester, during the conclusion of the student presentation, when you hear the students "extend" the research. For four months, the students have submerged themselves in a client's business. More often than not, they come out knowing more about the business than you do. In their presentation, based upon a summary of the data, they offer recommendations of what they would do "if this were my business."

"Yeah, that part is the most fun," says Bob Wills, director of computer operations for Ramsey County in St. Paul, a former student and client. "The students get a unique perspective of the company and offer all these suggestions, completely unburdened by internal politics and warring factions. They don't have to worry about drumming up future business."

#### Disadvantages are few

The disadvantages? For the students it's not knowing what

they don't know. Let's face it: Enthusiasm only goes so far. At some point — usually sooner rather than later — the client realizes that the students don't know everything. Not yet anyway. Therefore, it's going to take some patience to harness this mental powder keg. You have to spoon-feed them — and then watch to make sure that they don't stray too far.

Thus, there is a time investment for the research manager. On the other hand, how much time is wasted in "continuing education" seminars, courses, books, etc., that are attended, read and forgotten by the time one returns to the office?

#### Good students, good clients

In some areas, students have far more expertise than traditional research suppliers. Two of these areas include competitive research and research on the Net. Suppliers are too quick to roll up their sleeves and get going. Students, on the other hand, prove to be better detectives. They tend to carefully and painstakingly analyze, then react. One client recently told me that, "After the students came up with all their secondary information, I seriously considered canceling the whole project. I had no idea my competitors were up to this much stuff."

So who is better suited to this kind of work, an undergraduate or a graduate student? Undergraduates have more time and more enthusiasm, but oftentimes it's like baby-sitting puppies. They certainly throw themselves wholeheartedly into a project, but, through no fault of their own, they often lack the intellectual firepower of graduate students. Besides being older (and smarter), the "old dog" grad students usually have actual work experience under their belts which they bring to the project. I'm not

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dismissing undergraduates, I'm just saying they need tighter supervision.

So who makes a good client? Generally, the clients we look for are people with a background in marketing (not necessarily marketing research), who are a little bored with doing the same things over and over again. The best clients are those who are flexible and curious. They know there's an answer out there somewhere and getting to that answer is what's most important. The client has to be willing to share everything he or she knows about his company. (More often than not, both students and instructor sign confidentiality agreements.)

It's crucial that the client has some knowledge of marketing research. The few projects which went poorly did so because the students knew more marketing research than the client — after only one class. One time, at the first student-client meeting, the students were asking questions. The client became exasperated and said, “You tell me! You're the experts.” The person became an ex-client before the end of that meeting.

Another little secret: Past students make the best clients. They've been through the wars. They know what's required. They have the patience to work with new students. An added benefit of this relationship: Their companies (who frequently paid for their course in the first place) end up benefiting twice. “I thought I learned a lot in class,” says Todd Bille, director of operations at Satisfaction Management Systems, Minnetonka, Minn. “I was amazed at how much the world had changed once I became a client.”

### **How it works**

Working with students is pretty much like working with a research supplier. The project timetable is often just as similar.

1. Clients contact the school and, eventually, the instructor. The instructor screens the clients and determines their suitability for the students. This first step is often the most important, as the instructor has to play matchmaker for two parties who have yet to meet. At this time, the instructor gives the client an assignment: type a one-page summary describing who the client is and what questions he or she wants answered by the end of the semester “or the whole project will be a waste of time.”

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2. Students and clients should meet during the second week of class. Things are too hectic during the first week of class. Students are dropping, adding and transferring classes. By the second class, student teams have formed and students are ready to get to work. (Experience has shown that three students make the most workable team.) During this first meeting, students and clients agree to the best time for their weekly meetings (more about that later). Also, students and clients — together — complete a “client information sheet.” This sheet covers the following information:

- **Background:** Full statement of problem origin. Relevant details of situation. Various points of view with respect to the problem.

- **Objectives:** What one main question and five to six secondary questions must be answered in order to prevent this research from being a waste of time/money?

- **Secondary research opportunities:** Availability of previous studies? Annual reports? Articles? Web sites? Trade associations?

- **Budget:** Maximum amount which can be spent.

- **Application:** Complete description of decisions to be made on the basis of this research study. What specific actions will be taken pending results?

3. Throughout the semester, chunks of the projects have to be completed within “carved in stone” deadlines. Deadlines are sacred since students have a very finite amount of time to work on the projects. Unlike real-world suppliers, their semesters have a definite ending date. They must complete their work within a given period of time — or you end up doing it yourself. Assuming that the semester is 15 weeks (roughly four months) long, the following timetable works best:

- The proposal should be signed by the end of the fourth week of class.

- The questionnaire should be approved and in the field by the sixth week of class. Two to three weeks are allowed for data collection.

- Data tabulation can take one week (for telephone surveys) or two weeks for mail surveys. No matter what methodology is used, the students should be expected to code all open-ended questions.

- Plenty of time should be allowed for analysis — usually two to three weeks. This is really where the students have the

chance to shine.

- Presentation and report usually require another one to two weeks for completion.

As these deadlines are being met, lecture topics address each of the appropriate areas. Thus, class time and project work follow parallel paths.

#### **Rules of the road**

Obviously, a process this good needs some ground rules to operate smoothly. There aren't many, assuming both parties follow the guidelines previously stated, but both parties have to understand up front how the process works.

It's not free! Somehow, somewhere clients have come to assume that this process doesn't cost a dime. Wrong! Although students donate hundreds of hours of their time, they cannot be expected to pick up out-of-pocket costs. These costs include duplicating of mail surveys and postage as well as paying the telephone vendors who will collect data for a phone survey. It includes the cost of producing colored overheads and copying final reports. The students don't do the calling. This is the real world, after all — you don't make all your own phone calls, do you?

How much does a student study actually cost? Experience has shown that a mail survey will generally cost \$1,500, whereas telephone interviewing is often twice that. It is important to note that this money goes exclusively for out of pocket cost. The students do not receive any compensation for their time. The instructor should not receive anything beyond his normal teaching salary. (In other words, student research teams should not be slave labor for an instructor's consulting business.)

There are cost efficiencies, however. Oftentimes, local suppliers will give students a break. They are smart enough to recognize that these same professionals will be looking for marketing research suppliers down the road. Here in Minneapolis, Northstar Interviewing has done telephone work for students. Both Project Research and Focus Market Research have allowed us to use their focus group facilities for field trips. Later, many students — including me — have gone back to Northstar, Focus and Project Research for work for their own employers.

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Whenever the students do mail surveys, it's very helpful if the university allows them to send out surveys under institutional letterhead. Not only does this add to the credibility of the research, but it also contributes to some very impressive response rates. In the past 10 years, covering over 50 mail surveys, only twice have the students failed to achieve a response rate of less than 35 percent.

There's no such thing as too many meetings. A good rule of thumb: Clients and students should meet at least once per week (outside of class time, of course). Since the students are often working full- or part-time, it is important to schedule meetings when it is most convenient for everyone. In the past, successful meeting times have been before the workday begins, first thing in

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*It's important to recognize that this is a mutually beneficial relationship. In other words, the client is not benevolently "helping out a bunch of kids." Thus, it is inappropriate for the client to selfishly expect the students to accommodate his schedule. Working with a student team is a two-way partnership, not a one-way ego trip.*

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the morning, or right after work. It is crucial that the client be available to meet (i.e., consult) with the team.

At the same time, it is important that the instructor meet with the students and clients several times throughout the semester. My rule: Students must meet with me three times (outside class) and two times with me and the client during the course of the project. This allows me

to keep close tabs on what is going on. It also shows the client that the instructor is involved, that there is some control over where his or her money is going.

It's important to recognize that this is a mutually beneficial relationship. In other words, the client is not benevolently "helping out a bunch of kids." Thus, it is inappropriate for the client to selfishly expect the students to accommodate his schedule. Working with a student team is a two-way partnership, not a one-way ego trip.

Finally, at least once a week before formally beginning a new class, each student team is expected to give a one-minute progress report to his peers. The other students are encouraged to ask questions and offer suggestions. This enables students to learn from each other and provides an informal barometer of where they are vs. the other teams.

#### Tremendous rewards

So, that's it. Simple. A small investment reaps tremendous rewards. One problem is that clients keep coming back, wanting more work from more student teams. It's an enviable position to be in — being able to turn away work. Typically, we have twice as many potential clients as student students.

For the instructor, the greatest reward comes during the client presentation when the students are presenting the study's results. The students have presented to as few as one client to as many as 110 people. No matter how many are attending, all sit in rapt attention, treating their presenters as experts, knowing that at no other time will they work with a group who can provide a more in-depth understanding of their needs.

That's when the students also recognize that they've moved beyond the realm of grade-motivated worker to professional consultant. They've come to realize that "Nobody could have learned more about marketing research, that nobody could have put in more blood, sweat and tears, that nobody could understand the business more than we do." They've also learned that, henceforth, every marketing research supplier they deal with will be expected to live up to the standards they have set for themselves. □

*Editor's note: Amy J. Yoffie is president of Research Connections, Inc., an on-line marketing research firm in Westfield, N.J.*

When John Adams went off to Philadelphia in 1776 to write the Declaration of Independence, his wife Abigail admonished him to "Remember the ladies" in the nation's laws. Abigail's words, which fell on deaf ears then, are coming back to haunt on-line marketers today, as they struggle to take advantage of the economic potential of the Internet in general, and the World Wide Web in particular.

If you have been on the Web recently, you have discovered, as I have, how little marketing to women there is. It's not that there aren't sites directed toward women — there are. It's just that advertisers are ignoring them. Few women-focused sites have advertising, as marketers concentrate their time and money on sites where they expect to find men. The reason? Marketers are convinced that, given the dominance of men on-line, they do not need to be concerned about women on-line. Their perspective tends to be: "Women are not there, so who cares?"

They should. For while most marketers focus on the fact that two-thirds of on-line users are males, they ignore the obvious point that one-third are females. According to a report from Forrester Research, the number of women on-line will grow over 250 percent to reach 18 million in the next four years. Furthermore, the report says, working women will be the fastest growing segment, followed by women attending college and educated moms who stay at home with their kids. Kate Delhagen, author of the report, states: "These influential female consumers will have a significant impact on the Internet's development as a medium for commerce, communication and entertainment."

The sheer size of this group is reason enough for marketers to search for ways to reach women on-line. Here are seven other reasons why marketers should heed the call to "Remember the ladies."

1. Women have money. Across a number of studies, median household income for Internet users has been estimated at \$60,000. Women's Wire, a popular Web site for women, reports that more than 38 percent of women who visit there enjoy this same income level. Women on-line have discretionary income to spend and are willing to spend it. Last year, Regina Brady, CompuServe's director of interactive marketing, said that: "Women on-line are in higher positions and [earning greater] incomes than men on-line — you're getting influencers." So, not only will women purchase items on-line, they will influence others to do so, especially when they are presented with quality products and positive buying experiences.

2. Women are looking for ways to save time. Most

# Remember the ladies

## Why marketers should care about reaching women on-line

By Amy J. Yoffie



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women will tell you that the biggest problem they have is finding enough hours in the day. A survey administered by Interactive Publishing Alert (IPA) found that women are more likely to go on-line if they see a practical way to save time and money. The Forrester report confirmed this, finding that a major obstacle to women spending on-line is lack of time. This means that marketers must find ways to save women time on-line, with easy-to-use navigational tools and on-line ordering mechanisms that are fast, easy and efficient. In a recent on-line discussion, even women who like and have the time to go shopping in stores said they would shop on-line, if merchants made it easy and quick to order there.

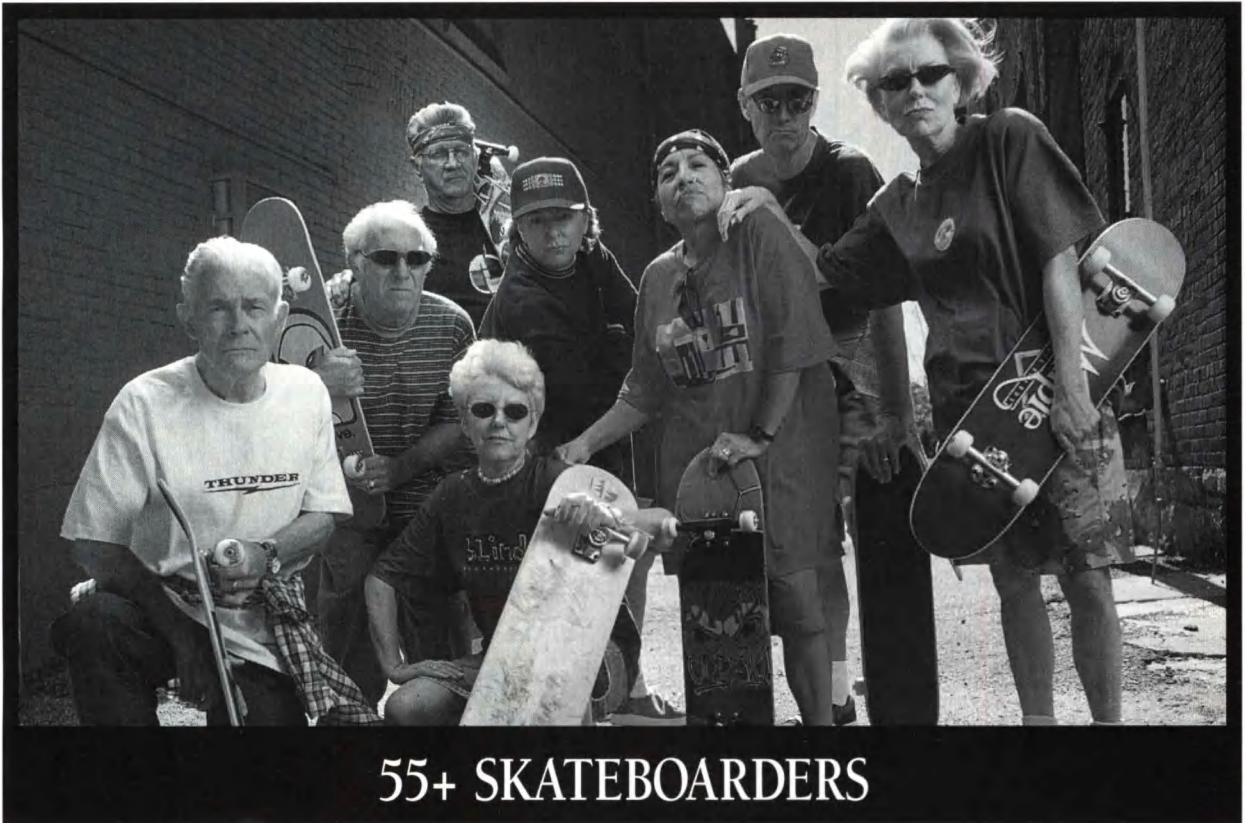
3. Women are more likely to shop. Women purchase 90 percent of home products, clothing, health care and perishable products. There is no reason to think this pattern will change on-line, any more than we would expect men to change their buying habits. In fact, marketers confirm that men don't shop any more on-line than they do off-line. With median sales at corporate Web sites averaging \$10,000 a year or less, one can only conclude that while men are the dominant users of the Internet, they are not doing so for the purposes of buying something. When they do shop, their purchases are targeted, which mirrors their off-line shopping behavior. They shop on-line to fulfill a social obligation — send flowers, buy cards, order an expensive gift. They also go on-line to get the best deal on equipment, comparing equipment features and costs. As noted by Phred Huber of Dean & Associates, on-line marketers have a choice — they can try to convert men into shoppers or they can reach out to the women already on-line and also work to attract more women to this new medium.

4. Women are heavy users of credit cards. Right now, credit card transactions are the most popular payment method on the Web. Therefore, marketers need to get the word out that using a credit card on-line is as safe — and perhaps safer — than using one in-person or by phone. As *Newsweek's* Jane Bryant Quinn noted recently, "When prudently used, the Net today is safe enough for personal shopping, investing, and even banking on-line . . . You're at a greater risk when you hand your credit card to a waiter than when you use it to shop by computer, provided that your electronic business is handled entirely in code." Marketers who reassure women that their on-line credit card transactions are safe are likely to see an increase in on-line business.

5. Women are going on-line seeking information. They are looking for solutions to health problems, political choices, how to parent, and more. According to IPA, "Women on-line are interested in software and quilting, political discussions and cooking, feminism and physics." The most successful commercial enterprises on the Web have been among marketers of big-ticket items, like automobiles, travel and electronics, where information is critical to consumers. It may be that they have been

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successful not because of the cost of what they are selling, but because of the amount of information they supply on-line. Ultimately, this is what makes the Web valuable to women, and these are the sites that women will visit before buying. Marketers who offer strong and informative content will attract women to their sites and earn both their loyalty and repeat visits.

6. Women are catalog purchasers. Marketers believe that one of the biggest obstacles to on-line shopping is the need to pay shipping and handling, but they are forgetting a very important segment of buyers — catalog shoppers. Women are the predominant catalog purchasers, and those who do so already accept these costs as the price of convenience. To save time, they are willing to pay the

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*While the value of the Web as a marketing vehicle is still evolving, it is clear that if women are not at the table, the full economic benefits of on-line commerce will never be achieved. Already, we know that women need a certain comfort level about going on-line that shields them from harassment and makes it easy for them to find out what they want to know.*

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premium prices that on-line marketers charge.

Furthermore, women who order by catalog are used to making decisions without touching and feeling the merchandise. They also are used to waiting for their purchases to arrive. Marketers who make this process easy and who send E-mail order confirmations, as well as notifications when the merchandise is sent out, are most likely to attract and retain women buyers to their sites.

7. Focusing on women works. Companies have learned that if they target

advertising to women, they can sell them traditional male-oriented products like software. Microsoft found this out accidentally when, after showing a TV ad of a mother using Encarta with her daughter, inquiries to retailers rose 40,000 higher than anticipated in a two-week period. In the fall of 1995, Borland software ran its first ad featuring businesswomen using Quattro Pro and reported that its sales rose 40 percent, with nearly all of these buyers being women. Similarly, when Borland conducted point-of-sale interviews to determine who buys games for children, nearly 100 percent were mothers who both brought the children to the stores and made the final decision about buying the products. This model will find success on-line as well.

So, while John Adams failed to heed Abigail's advice, marketers need not make the same mistake. Like automobile dealers who learned that women do in fact buy cars, those who seek to realize the vast potential of electronic commerce will have to expand their efforts to include all members of the buying public.

While the value of the Web as a marketing vehicle is still evolving, it is clear that if women are not at the table, the full economic benefits of on-line commerce will never be achieved. Already, we know that women need a certain comfort level about going on-line that shields them from harassment and makes it easy for them to find out what they want to know. Friendly, easy-to-find store fronts and cybermalls, comprehensive information that aids in the purchase decision, and ease-of-buying will vastly change the earning potential of the Web.

As noted recently in *Advertising Age*: "The developments of the next year will dictate whether the Web becomes an indispensable advertising vehicle or another over-hyped and under-delivered technology development . . . Next year is the year [on-line marketers] show value, or [they] don't survive." Delivering the potential of women buyers is critical to this survival. □

## Testing product innovations: a case history

By Ben Luden

*Editor's note: Ben Luden is a freelance writer in Westport, Conn.*

The alarming, disappointing and expensive rate of new product and service failures impel marketing researchers to sharpen their concept testing techniques. To help minimize these marketing risks, two essential goals of testing product innovations should be: to determine whether the innovation serves a current need or potential interest; and to present the innovation to potential users in a blind fashion (more on that later). Only if these two conditions are met should further research be considered.

Next, the marketer must measure the concept/innovation in relation to similar, though not necessarily identical, kinds of product or services. In short, the aim should be to design the research in a way that simulates actual conditions, i.e., marketplace reality, as closely as possible. It was with these requirements in mind that the following experiment was designed and conducted.

General Electric was considering designing and building a hose reel into a canister vacuum cleaner. Since no such device existed at the time, it was a genuine innovation.

The customary procedure would have been to simply ask a sample of women their opinion of the device and whether they would like to have one included in their next vacuum cleaner. However, misleading results of concept test interviews conducted in a similar way leave little doubt that this simplistic method can be disastrous. Respondents are often enthusiastic about innovation and hence they react positively to the concept — until it comes time to buy it. Similar pitfalls result from respondent bias — either pro or con — to the interviewer, a bias which

cannot be measured.

Instead, the marketing research department divided the problem into several parts, each to be investigated independently, and without revealing the innovation individually to respondents. Each part, conducted independently, would yield answers as to whether or not continue to the next part, and finally, a recommendation for action. In addition to avoiding the pitfalls described earlier, this process was economical.

The first part was to determine whether there was any interest in hose storage on a canister vacuum cleaner, and, if so, how much? The answer would dictate whether or not to proceed to the next one.

A sample of canister vacuum cleaner owners was asked to describe, step by step, the process they followed the last time they vacuumed — and which step was most bothersome. “Would you think back to the last time you took out your canister vacuum cleaner to use it, and tell me, please, the steps you took until you were ready to begin cleaning?” Next: “Now, as you think of each step, which one gave you the most difficulty?” Here are the results:

Hose (finding, unpacking, taking down, attaching, etc.) .....	23%
Cord (untangling, unwinding, etc.) .....	10%
Attachments (finding, gathering, carrying, returning for, etc.) .....	7%
Cleaning tube (finding, fell apart, etc.) .....	6%
Other problems (those cited by less than 5 percent) .....	36%
No troubles .....	18%
Total .....	100%
Number of respondents: 240	

Among users aware of one or more problems, the hose presented a difficulty to 23 percent. While not a majority,

it was considered as great a difficulty as the cord, attachments and tube problems combined. The results justified a budget for further tests — preparing sketches and, later, models for inspection and continued interviewing.

Note that at no time were consumers questioned about hose storage in particular, nor asked to state an opinion about a “cleaner with a hose reel.” Instead, the desire for the device was determined and measured by the de-

sign of the interview — and without having to build a prototype.

Next, a matched sample of canister cleaner owners was shown a series of sketches. Each illustrated the same basic canister cleaner, but each featured a different device for storing components. The owners were asked which of these devices they considered most useful. “Now here are pictures of four similar vacuum cleaners. All have the same cleaning power. The only variance is that each has a different component storage feature:

1. This one has an automatic cord reel. The cord spring-winds into the cleaner.

2. This one has a hose reel. The hose winds into the cleaner.

3. This one has a compartment for storing the attachments.

4. This one has an extension tube.

Would you look at them, please, and try to think of which feature would be most useful?”

Hose reel .....	32%
Cord reel .....	27%
Attachment compartment .....	33%
Extension tube .....	8%
None of these .....	0%
Total .....	100%
<b>Number of respondents: 283</b>	

There was no significant difference between the number of respondents who favored the hose reel versus the attachment. It’s conceivable that the drawing did not illustrate the hose reel clearly enough to give it the prominence it achieved in the other steps.

Another group of owners was shown a prototype of the cleaner complete with all features. After a demonstration of the operation and use of each feature, they were told to assume that they could have just one in their next cleaner, and were asked which one they would choose. The hose reel was the first choice of 46 percent — almost half of the sample. The other devices were considerably less favored: cord reel, 26 percent; attachment compartment, 21 percent; extension tube, 7 percent.

Finally, a base price (\$169.95) was

shown on an ordinary canister cleaner, one without any of the features. Then, price tags were put on each feature and shown to another sample, whose members were asked: “Which of these features, if any, would you want on your next cleaner? Keep in mind how much each one would add to the price, that is, how much more you would have to pay for the cleaner.”

	Device price	Total price
Basic unit -	\$169.95	
Hose reel	\$34.95	\$204.90
Cord reel	\$24.00	\$193.95
Attachment compartment	\$16.00	\$185.95
Extension tube	\$10.00	\$179.95

The choices follow:

Hose reel .....	32%
Cord reel .....	24%
Attachment compartment .....	24%
Extension tube .....	20%
Total .....	100%
<b>Number of respondents: 240</b>	

When put to the crucial test of price, the hose reel declined in share of first choices, as was anticipated. However, it retained first place for 32 percent of the respondents. This is 8 percentage points (almost 33 percent) ahead of both cord reel and attachment compartment, and 12 points (over 60 percent) above the extension tube. (Though not statistically significant because of the small base, the differences appear appreciable).

Thus, interest in and desire for a hose reel did exist at four independent levels of testing, and without respondents’ knowledge of what they were being queried about:

1. Conceptually — in a spontaneous response question with no mention of innovation.

2. Graphically — when viewed in a sample sketch.

3. Actually — when the device was demonstrated on a prototype.

4. Cost-wise — when it was priced relative to other features.

Armed with this information, the marketing research department recommended that the concept be subjected to statistically reliable research. (Regrettably, shortly after this project, General Electric sold its vacuum cleaner department.) □



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# Mystery shopping 101

By Al Goldsmith

*Editor's note: Al Goldsmith is director of Virtual Customers research for Maritz Marketing Research Inc., St. Louis, Mo.*

In today's competitive marketplace customer service is often the distinguishing factor among industry leaders. In addition to identifying the characteristics of excellent customer service, many companies have discovered (or re-discovered, as the case may be) a variety of measurement methods that track or monitor customer service provided by front-line employees. One such method that has been gaining popularity has actually been around for decades: mystery shopping.

There are several reasons for increased interest in mystery shopping:

- More than ever, retailers offering similar products know that excellent customer service is one of the best ways to increase sales. Excellent service can be encouraged and rewarded through mystery shopping.

- Reduction in middle-management/supervisory positions has forced companies to make greater use of outside organizations to monitor employee performance, particularly when they are dealing with customers and prospects.

- Retailers are always interested in finding out what their competition is doing, a service mystery shopping can provide.

- Today's retailers understand that unless a price war occurs between businesses, consumers are likely to frequent an establishment where the personnel are friendly and knowledgeable.

## Limitations

Although mystery shopping can become a powerful customer listening post and a positive force within a business, management must realize certain limitations when selecting measurement or evaluation criteria.

- Criteria to be evaluated must be objective rather than subjective. Mystery shopper observations are limited to a choice of fixed alternatives.

- It is not feasible to conduct a mystery shopping program with the same number of interviews (facility visits) as a marketing research project which uses phone interviews or mail surveys.

- Mystery shopping is not an exact science. About 5 percent of mystery shoppers' evaluations will be questioned and/or appealed if the facility knows that a mystery shop has occurred.

## Mystery shopping classifications

There are basically four variations on the mystery shopping concept. Each offers choices in the depth and type of information collected.

Level 1 - The mystery shopper conducts a mystery telephone call. Here, the mystery shopper calls the client location and evaluates the level of service received over the phone, following a scripted conversation.

Level 2 - The mystery shopper visits an establishment and makes a quick purchase; little or no customer-employee interaction is required. For example, in a Level 2 mystery shop, a mystery shopper purchases an item (e.g., gas, a hamburger, or a lottery ticket) and evaluates the transaction and image of the facility.

Level 3 - The mystery shopper visits an establishment and, using a script or scenario, initiates a conversation with a service and/or sales representative. Level 3 mystery shopping usually does not involve an actual purchase. Examples include discussing different cellular telephone packages with a sales representative, reviewing services provided during an oil change, etc.

Level 4 - The mystery shopper performs a visit that requires excellent com-

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munication skills and knowledge of the product. Discussing a home loan, the process for purchasing a new car or visiting apartment complexes serve as examples.

## Factors affecting pricing

Besides the different pricing levels for mystery shopping, a company should consider the following when developing and/or planning a mystery shopping program.

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*More than ever, retailers offering similar products know that excellent customer service is one of the best ways to increase sales. Excellent service can be encouraged and rewarded through mystery shopping.*

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- Method of evaluation — physical visit or telephone call.
- Geographic area to be covered — rural versus metro.
- Number/frequency of mystery shop visits and/or evaluations.
- Reporting requirements — types of reports, distribution method (i.e., fax, graphics, tabular, etc.)

Mystery shopping can bring managers at all levels and front-line employees in touch with customer needs and perspectives as seen through the eyes of trained professionals who experience the business first-hand. When implemented properly, mystery shopping can become a positive, motivating experience that rewards people for a job well done, identifies areas where training can improve customer service, and sheds light on unrecognized opportunities for increased sales. □

## Survey Monitor

continued from p. 6

price/value option. U.S. brand units were regarded as being of higher quality and lower price generally than Japanese-made products. Domestic units were deemed to be moderately priced, but ranked third in quality. Products carrying U.S. brand names were generally perceived to be expensive and of inferior quality.

While U.S.-made ready-to-eat cereals garnered top-quality laurels among those polled, they were perceived as more expensive than domestic-made cereals, which were rated well above average in quality. Perceptions of the category were highly consistent across the region, regardless of age, gender or socioeconomic status of the respondents.

Not only are U.S. ready-to-eat cereals the highest rated, but domestic ready-to-eat cereals, the only real threat, lag well behind. Chile provides the sharpest distinction, where the mean quality rating for U.S. cereals is almost 40 percent higher than ratings for the domestic alternative.

To a large degree, this is due to the perception of the category itself. Traditionally, cold ready-to-eat breakfast cereal has been perceived as an American breakfast. It follows logically, that if one is to consume an "American breakfast," then U.S. brands offer the more "genuine" product, despite the fact that many ready-to-eat cereals have been reformulated to accommodate local tastes.

Mexican usage of ready-to-eat breakfast cereals — which have been traditionally positioned as a day-long snack for the entire family — is more than 20 percentage points higher than in the other countries. Chilean breakfast taste preferences tend to follow a more European tradition. Rather than having cold, pre-packaged ready-to-eat cereals their breakfast usually consists of rolls, croissants and coffee. Chile distinguishes itself by consuming less, not more of some of the products, namely, pre-packaged cheese and ready-to-eat breakfast cereals.

As world-class wine-producers, Argentines and Chileans perceive their wines as the highest in quality, while Mexicans and Brazilians put European

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wines at the top of their list. Only in Mexico's perception do U.S. wines approximate the perceived quality of the others.

While European wines were judged to be of the highest quality, they were seen as somewhat expensive. Domestic wines were thought to be the least costly and of good quality. American wines ranked third in quality and price. As is the case with beer, the Japanese product is poorly marketed, poorly known and not perceived as being either of high quality or affordable.

The overall poor image attributed to U.S. wines in Latin America obeys the same dynamic as Japanese beer. Since domestic and European wines have a long-established distribution, and more recently a marketing presence in Latin America, they at least have evolved top of mind awareness, while U.S. wines have not.

Latin American consumers strongly favored their domestic beers for quality and overall price/value. In the two largest markets, Brazil and Mexico, respondents allocated the second place in beer-brewing quality — after their domestic

product — to the United States.

There is across-the-board consistency in allocating the second place for quality to the U.S. product. Not only is U.S. beer perceived as being second in quality only to the domestic brands, but it consistently edges out European beers, usually seen as more expensive.

Because national beer brands haven't been marketed extensively outside of their own domestic markets, an enormous opportunity exists for a globalized beer brand that would meet the product standard commonly demanded across the region.

Almost half of all Latin American consumers consider the "Made in the U.S." label a symbol of higher quality. When asked about their perception of quality of U.S.-made goods vis-a-vis domestic products, COMPASS respondents revealed a strong disposition favorable to American products.

**"Things made in the U.S. tend to be of higher quality than things made domestically."**

	Total	Argentina	Mexico	Chile	Brazil
Strongly agree/Agree	49%	39%	48%	58%	51%

While American products seem to enjoy greater equity among Chileans and Brazilians, their share of mind is divided with products from other countries in Argentina and Mexico. Data also revealed slightly higher opinion in favor of the U.S.-label among Latin males over females (54 percent vs. 45 percent) and younger and older over middle aged (30-44) consumers.

A more favorable opinion towards U.S.-made goods was found among more upscale males. Emerging middle-class Latin females reported slightly lower levels of preference for American products.

Television programming produced in the U.S. enjoys an enviable position in Latin America. Latin American consumers across the board, give American programs high ratings in quality. Mexicans consider U.S. programming superior to their own, while elsewhere, domestic programs surpass American programming by only a small margin. Europe and Japan figure very slightly in the area of television programming, being consistently ranked below domestic and U.S.-produced television. For more information call 619-232-5628.

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**Many Americans concerned about FDA drug approval delay**

The lengthy Food and Drug Administration approval process for new medications, which has long frustrated doctors, patients and pharmaceutical companies, is now a significant concern of the general public, according to findings from IssueTrack/USA, an ongoing study by Audits & Surveys Worldwide, New York. After interviewing a national sample of randomly selected adults, 18 years of age or older, ASW noted that a clear majority of Americans are now aware of the health risks associated with keeping potentially useful drugs off the market while the regulatory agency reviews their safety and



effectiveness.

"Extended FDA drug approval procedures often prevent U.S. citizens from reaping the benefits of medical research long after these advances are used in other parts of the world," says Barry M. Feinberg, senior vice president and director of ASW's Public Affairs Division. "While this has long disturbed many doctors and patients, it was difficult to bring this issue into focus for the vast majority of people who were not (or did not know they were) affected by bureaucratic delay. The AIDS epidemic changed all that. Although AIDS is now found throughout every sector of the population, it poses a far greater threat to the gay community, which has mobilized and used its political and financial resources to bring about a greater awareness of this problem, which affects virtually every U. S. citizen."

More than half (56 percent) of U.S. adults are aware of the health and safety risks associated with the time it takes the Food and Drug Administration to approve new drugs and one-third of all Americans are personally concerned and urgently want action (34 percent) taken

to speed up the process. For more information call Barry Feinberg at 212-627-9700.

## Surfing the Net not yet a global activity

Is the Internet truly the international phenomenon it was intended to be? A new 18-country study of adult consumers' awareness and use of personal computers and the Internet reveals that few consumers around the globe have ventured into cyberspace.

The study was conducted by Response Analysis Corporation and its partners in the International Research InstituteS (IriS), a network of independent marketing research companies in North America, Europe, Australia and Asia.

"Businesses hoping to market their goods and services internationally through the World Wide Web must un-

derstand that, despite the potential, Internet use is only in the early stages of adoption," says Jim Fouss, CEO of Response Analysis, Princeton, N.J. "But the potential for future adoption of this new medium as an effective marketing tool for businesses holds great promise," adds Fouss, who is 1996-97 president of the IriS network.

Among the highlights of the study:

The workplace represents the greatest opportunities for growth of Internet and World Wide Web usage. Sweden and Finland lead in workplace access, with more than one-tenth of adults using the Internet for business communications and information, followed by the United States (9 percent) and Australia (8 percent). But in France, Greece, Italy, Cyprus, Portugal and Spain, 2 percent or fewer adults use the Internet at work.

Currently, only very small proportions of consumers are using the Internet at home. Household Internet access is highest in the United States and Canada (8 percent each) and lowest in Spain and Portugal (less than 1 percent). Worldwide, hands-on experience with the



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Internet at home is the privilege of only a small percentage of adults — mainly upper-income males under age 55.

In all countries but Sweden, fewer than half of households that have the current potential to use the Internet actually do. However, the prevalence of personal computers with modems — indicating the potential use and growth of the Internet at home — is highest in the United States and Canada, where about one-fifth of households are capable of Internet access. In Australia, Mexico, Finland, the Netherlands, Sweden and Switzerland, about one-tenth of households have Internet capability, while other countries trail far behind.

While most consumers lack the equipment to use the Internet, they do know it exists. At least three-quarters of adults in Sweden, the U.S., Canada, the Netherlands, Australia, Finland and Great Britain, are familiar with the Internet and World Wide Web. Even in Cyprus, ranked lowest in awareness, four in 10 adults have heard of the Net.

est opportunities for growth of Internet and World Wide Web usage. In Sweden (12 percent) and Finland (11 percent) more than one in 10 consumers are using the Internet in their offices for communications and information purposes. Workplace access to the Internet is next highest in the United States (9 percent) and Australia (8 percent). It is lowest in France and Cyprus (1 percent each).

While household usage of the Internet translates into millions of users — about 25 million adults in the 18 countries surveyed — only very small proportions of consumers are using the Internet at home. Household Internet access is highest in the United States and Canada (8 percent each). It is lowest in Portugal and Spain (less than 1 percent).

Familiarity with the Internet and the World Wide Web — which indicates the potential for future use — varies greatly. Awareness is highest in Sweden (91 percent) and lowest in Cyprus (39 percent). In every country surveyed, men were more familiar

with the Internet than women, adults under age 55 were more aware than their older counterparts, and higher-income consumers were more likely than low-income consumers to have heard of the Internet.

The prevalence of personal computers with modems predicts the potential use and growth of the Internet for home use. About one-fifth of households in the United States (19 percent) and Canada (18 percent) have a personal computer with modem, followed by Australia (12 percent), Finland (10 percent), and Sweden, Mexico and the Netherlands (each 9 percent). Other countries in Northern and Southern Europe lag far behind in terms of current capability for Internet usage.

Except for Sweden, fewer than half of households that have the potential to use the Internet are actually using it. The lowest ratio is in Mexico, where only one-fifth of households capable of accessing the Internet are doing so.

IriS members conducted interviews with 15,835 adults age 18 or older in late 1995 and early 1996. The survey results represent more than 500 million consumers in the U.S., Canada, Australia, Mexico, Sweden, the Netherlands, Finland, Great Britain, Switzerland, France, Belgium, Germany, Turkey, Greece, Portugal, Italy, Spain and Cyprus. For more information call 609-921-3333.

## Are you ready for the Internet PC?

As reported in *Intelligram*, a publication of IntelliQuest, Austin, Texas, the technology industry is abuzz with the upcoming Internet PC, Network PC, information appliance, or whatever you want to call it. Widely covered in the trade press, stories about the Internet PC are hitting the mainstream media as well.

Depending on who you ask, this device will or won't connect to your



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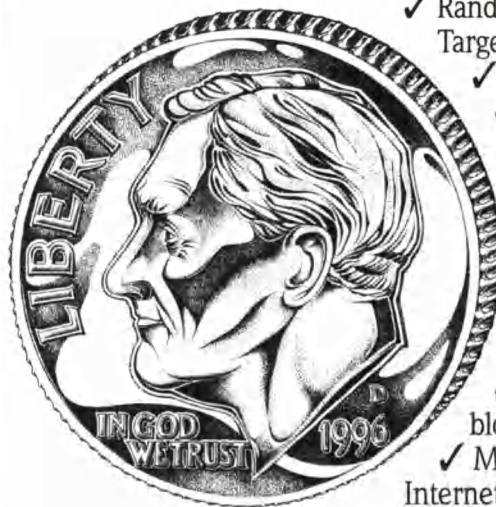
TV, but it will be priced so low and make it so easy to get on the Internet, that everyone will have one (or more) in their home and office. Gone will be the days of power hungry operating systems and applications; you will just download a series of the most up-to-date applets for the specific task at hand, on a pay-as-you-go basis. New multitudes will join the ranks of the wired.

Or will they? According to the baseline wave of IntelliQuest's Worldwide Internet/On-line Tracking Service (WWITS), 10 percent of the U.S. population over the age of 16 have heard of a dedicated device for the sole purpose of accessing the Internet. But the people who know about this device are already Internet and on-line service users. Twenty-nine percent of current users report that they have heard of such devices, compared to 6 percent of non-users.

Of those that have heard of this device 29 percent, or about 4.9 million people, would consider purchasing it. They envision this product as a home access device and usually as an addition to their current computer. Almost all (96 percent) of those that would consider purchasing this product would use it at home, compared to 26 percent who see using it at work. Seventy percent would be purchasing this device as an additional system, as opposed to a replacement for a computer or as the first system acquired.

This data from WWITS illustrates two points for technology marketers to consider. First, industry interest in a product or service does not always translate into widespread public awareness. Most technology product launches don't make the morning news. Second, the public's image of a product or service can vary widely from the view a company is trying to portray. Fully understanding the awareness and the perceptions of a new product before it is launched can make the move to market that much easier. For more information call 512-329-0808 or visit the company's Web site at <http://www.intelliquest.com>.

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## Product & Service Update

continued from p. 8

mation call 800-250-7817 or visit the company's Web site at <http://www.ends.com>.

## System lets clients reach Market Facts via Internet

Market Facts, Inc., Arlington Heights, Ill., has introduced MFI CONNECT, a new system that allows its clients to conduct marketing research business with the company using the Internet. MFI CONNECT is a secure, high-speed system that provides clients with instantaneous access to data, reports and presentations prepared by Market Facts. For more information call 847-590-7000.

## Find your 4Tune

Right Information Systems Inc., Newburyport, Mass., has released 4Tune, its data mining tool designed to integrate with data warehousing applications. The "click and analyze" capability of 4Tune mines and identifies key factors and their

influences producing accurate forecasts. For more information call 508-463-9415 or visit the company's Web site at <http://www.4thought.com>.

## Reports detail winners of government contracts

GovCon, the Government Contractor Resource Center, an Internet resource that contains information for firms that do business with the federal government, has introduced reports that detail which companies are winning awards through FACNET, the government's electronic bidding system, and products purchased and the value of each award. FACNET is an electronic data interchange vehicle to give vendors of supplies, products and services a way to peruse and respond electronically to government bids under \$100,000. The government then makes awards and submits purchase orders through the same network. The reports can be ordered from the GovCon Web site at <http://www.govcon.com>. Or call Edward Rosenfeld at 301-258-8292 ext. 4775.

## CD-ROM profiles businesses in 54 U.S. regions

Dun & Bradstreet Information Services, Murray Hill, N.J., has released a CD-ROM that provides immediate access to sales and marketing information on the most prominent public and private companies in the U.S. The D&B Regional Business Directory Disc is an electronic version of D&B's Regional Business Directory. The CD-ROM gives users unlimited access to 20,000 of the largest businesses in a region, with up to 10 executive names and titles per company. The disc offers 54 regions in the U.S. to choose from. The disc contains company name, address, telephone number, D&B D-U-N-S Number, eight-digit SIC code, year started, actual or estimated sales (not sales range), number of employees at the location listed and company-wide (not employee range), up to 10 executive names and titles, public/private indicator, subsidiary/branch indicator and parent company. Users can search and sort the information by type of business, company name, geography and many other criteria. They can also create custom or standard reports and export the data to other software. For more information call 800-526-0651 or visit the company's Web site at <http://www.dbisna.com>.

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# Yamaha

continued from p. 11

salesperson doesn't win, the shopper doesn't say anything. They've taken up the salesperson's time and we don't want to have a negative impact by having them spend time on a sale that's not real," Lynch says.

(While the shoppers aren't supposed to be truly interested in buying a piano, Lynch says that each year, a few secret shoppers buy a Clavinova as a result of participating in the program. "They may not have been aware of the product before and once they find out about it, they remember how much they used to enjoy playing the piano and purchase one.")

## Explicit instructions

Erick & Lavidge, an Atlanta research firm, conducts the secret shopper program for Yamaha. The program begins in the fall (Yamaha's busiest sales time of the year) and runs for three months, encompassing about 700 shops a year across the country.

Shoppers get very explicit instructions prior to visiting the music store, says Jeff Hughes, account executive. Erick & Lavidge. "They are to ask about a particular feature or benefit and leave it open for the salesman to direct them to a particular product. In this case, they ask for a good used piano and then see if the salesman takes them to the Clavinova."

Prior to the shop they're given Clavinova brochures to familiarize themselves with the product. "That way the shoppers are more comfortable and they have a better feel for what they're doing. It requires a little advance coordination because you have to get the information to the research firm in time to distribute it to the shoppers, but it's well worth the effort," Lynch says.

## Positive reinforcement

The program has logged a 50 percent or slightly higher "win" rate every year. Salespeople most often lose because they show the shopper one of the many inexpensive portable pianos on the market. "The Clavinova line starts at \$2,000 retail and goes to \$10,000. Portable keyboards can be purchased for a few hundred dollars. Some salespeople may feel that because the customer came in asking for a used piano, money is the main consideration, and so they take them to a portable keyboard since they're probably looking for a bargain," Lynch says.

In cases where salespeople don't win, one of Yamaha's 14 regional general managers will talk to them, to reinforce in a positive way that they missed an opportunity. That

positive approach is key to handling store personnel who don't perform well in the mystery shop, says Hughes. "For manufacturers, talking to store management and employees is a way to say, 'Here's where you can improve the sales of our products by following these guidelines and using the sales tools that we provide you. If you follow these you probably would see sales increase.' It's not a way of catching somebody doing something wrong, it's a way of catching somebody doing it right and promoting it."

Though mystery shopping started out as a way to monitor employee honesty, Gary Harper, vice president of marketing services, Erick & Lavidge, says his company stresses using it as a tool for positive reinforcement. "We do not like to get involved in negative mystery shopping programs. A lot of people believe that mystery shopping should be done to catch the thief or the person who's not doing their job. It's something that mystery shopping can do and has done but we think that's a poor application of a good tool," Harper says.

"We want to be involved in positive applications, because it puts us in a favorable light, and it puts the shopper and the salesperson in a favorable light. Nobody wants to mystery shop knowing that they're doing somebody harm. We counsel our customers in that same direction."

## Top of mind

For Yamaha, what started as a way of bringing attention to a new product now serves as a way to keep the Clavinova top of mind with salespeople. "Yamaha wanted to find out what dealers were saying about the

Clavinova," says Harper. "That's usually one of the goals of this kind of mystery shopping program. Manufacturers want to find out how their brand is being presented to the buying public. Is it number one on the salesperson's mind? Do they tout it as being the best? Any manufacturer spends a good deal of money with the retail trade trying to stimulate interest in their brand, trying to get the channel to say something positive about their brand and sell it ahead of everyone else's."

In addition to monitoring salespeople, Yamaha's secret shopper program also provides valuable retail-level data about the stores that sell Yamaha products, Lynch says. "We welcome comments from shoppers, and we pay attention to them. Some will say that the store didn't have any brochures, for example, but whatever it is we pay attention to them because it's direct input from retail. We're in the wholesale end of it so we don't get a lot of that kind of information."

## Know the punch line

Because the program has run for many years, there are salespeople around the country who know that the line "I'm looking for a good used piano" most likely means the customer is a secret shopper and that they'll earn an easy \$100 by showing them a Clavinova. Lynch says Yamaha is happy to award these veteran salespeople. "The fact that a person may pick up on the punch line is OK. It costs us some money but it doesn't bother us at all. We've made that salesperson happy and they'll probably try to sell more of our product as a result." □

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## Patterns

continued from p. 13

mandated it. Unibanco also learned that the number one problem reported by shoppers was the quality of the personal treatment they received from bank employees.

For Unibanco, faced with stacks of objective data, a light went on. Management realized that shopping results truly reflected the experience of bank customers. This led Unibanco to focus on changes needed in the area of customer service.

A large utility company also made a surprising discovery when it partnered with Shop'n Chek to set up a benchmark study in 1989. The company had eliminated the deposit that customers must pay in order to obtain service, due to negative customer feedback on the policy.

During the mystery shopping process, however, this utility company learned that there was one region that still required deposits from all customers! While the company was greatly surprised by this lapse in communication, management accepted the truth of the situation and used this intelligence to enhance regional communication.

### Stage 2: acceptance

As multiple shop waves occur, cor-

porate, regional and store level personnel alike begin to see patterns emerge in the data and to accept the possibility of its validity.

Accepting the results of a shopping program as truth usually requires that several waves of shopping be completed. It may be easy for managers to deny results of a single shop by rationalizing that "it was a bad day," or "my worst employee." But after multiple shops are completed performance patterns emerge regardless of the time or day of the week a shop is performed. Obviously results can not be attributable to a single employee, or a single location; the resulting acceptance and buy-in is the next stage in the evolution of the mystery shopping program, and the key to its ultimate success.

Acceptance is hastened when:

- top and middle management clearly express the goals of the program and stress its use as a tool and not a punitive system;
- field personnel such as store managers have a forum to discuss findings or obtain additional feedback (Shop'n Chek establishes a toll-free line staffed with a person dedicated to fair resolution of any concerns);
- the mystery shopping program utilizes strict quality assurance procedures to provide unimpeachable, accurate data.

After accepting the results as meaningful and useful, the company's field organization can begin to implement solutions. Such solutions can take many forms — from a basic hands-on discussion of an individual store's results with the crew to complex corporate training and enhancement programs.

Basic solutions generally start at the store level. Store managers post results in a conspicuous place (eliminating any employee names) and discuss results in weekly staff meetings. A good way to get everyone involved is to encourage employees to brainstorm concerning what could or should have taken place in a certain scenario. In this way everyone participates and learns. More creative store managers can devise special incentives for the team, such as a pizza party when there is a perfect score, or individual incentives such as a special parking spot when there is a "winner." One company created a contest between stores, with the best in the district receiving a tin of popcorn. Establishing a dialogue between employees and managers is the key here.

By building a well-communicated series of awards and recognition into a program, an organization can motivate employees to perform according to established expectations. This enforces training programs and policies and shows that excellence is both rewarded and appreciated.

At the next level, district and regional managers may implement many of the same techniques to motivate their store managers, and may even set up competitions among themselves. At the corporate level, additional incentives and particularly recognition further encourage performance. One incentive corporate management can provide is informal training using individuals from key departments and/or development of new training materials (such as interactive CD-ROMs) to provide more support. Another popular motivator is recognition of top performers and stores in the company newsletter and at company award dinners.

After Unibanco learned that one of the shoppers' greatest concerns was the quality of personal interaction they

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had with bank employees, it developed "In Harmony With the Client," a training program designed to encourage bank employees to consider clients' needs first.

"When we started the 'In Harmony' program, Unibanco was at the same level of customer service as other banks in Brazil — quite low. Now Unibanco is renowned for its customer service. They're actually way ahead of other banks in terms of meeting the needs of clients," says Eduardo Schubert of Indicator, the Shop'n Chek licensee that created Unibanco's program.

Unibanco has incorporated the actual results of each mystery shop into its employee motivation program. Each branch is ranked according to its questionnaire score. Those with high scores receive prizes, letters of recognition, and participate in award ceremonies.

### Stage 3: primary rewards

Following implementation and execution of solutions to generate shopping score (and thus service) improvements, primary rewards begin to occur. While improved mystery shopping scores may be the initial focus, especially when incentives are involved (this is a reason that items like trophies and plaques may only produce short-term motivation and results), once performance begins to improve and the focus shifts to improving service versus just winning awards, the real benefits or primary rewards, begin to accrue. These include:

- improved customer satisfaction;
- better customer retention;
- improved customer loyalty;
- increased sales;
- higher employee retention and satisfaction;
- external customer service/satisfaction awards.

### Stage 4: cultural indoctrination

Once an organization begins to accrue these rewards, the final conscious connection is made between the shopping program, used as a tool for improvement, and these primary rewards. The organization at all levels cannot imagine operating without this

tool or returning to the previous levels of performance.

This is the step known as cultural indoctrination. In more than one case, we have had clients cancel a program due to budget restrictions or other reasons only to encounter a groundswell of response from the field organization to reinstate the program.

Shop'n Chek has received feedback from our mystery shoppers as well. Sometimes shoppers will tell us they have noticed a decrease in customer service at establishments that have terminated their mystery shopping programs. Shoppers have also let Shop'n Chek know when they notice a great increase in the level of customer service at companies that utilize an ongoing mystery shopping program.

### These phases are normal

Knowing that these phases are normal — in fact necessary — elements in the evolution of a mystery shopping program can be helpful when initiating or revamping a program. Acceleration of the process leads to a

faster achievement of the primary rewards which are the goal of every business and the ultimate reason for utilizing a mystery shopping program.

The "mystery" in mystery shopping must never refer to the objectives and ultimate goals of an organization's program. The irony of the process for our company is that if every store everywhere "scored 100 percent," we and our industry would be expendable; yet that is the goal that drives us each and every day. □

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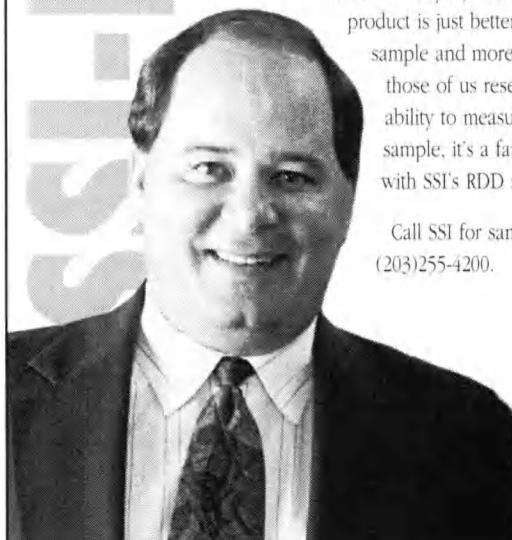
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## Taking the mystery out

continued from p. 14

- 69% cite poor service
- 13% product dissatisfaction
- 9% competitive reasons
- 5% other
- 3% move away
- 1% die

- It costs five (seven, 10, etc.) times more to find a new customer than to keep an existing one.

- One unhappy customer will tell 10 other people of their bad experience with service. These people may then tell 10 others, and so on.

- What gets measured, gets done.

The benefits of a mystery shopping program are numerous. A well designed program can help train and motivate front-line employees. It effectively communicates to employees what is most important in serving customers. It can be used to measure customer satisfaction along with other methods. It's an important competitive tool in monitoring pricing, promotions and product quality. It can be used to identify potential problems before they develop into major problems.

### Big Brother is watching

Mystery shopping is used most often to evaluate an individual's performance. When evaluating an individual, it is critical that the evaluation is objective and factual. To

ensure this, several states even require mystery shoppers to have licenses. While companies should use mystery shopping to improve employee service or sales skills, and not as a device to spy on them to catch them doing something wrong, it is nonetheless reflective of the employee's ability to do their job.

To take Big Brother out of the picture, it has become more popular to use mystery shopping as a vehicle for presenting awards — either on the spot or as part of an overall bonus program. The net effect of awards-based mystery shopping is that it has become much more important to employees and managers, which is a good thing.

Employees need to be involved in order for a mystery shopping program to be successful. With bonuses and awards at stake, employees and managers may dispute the reports more frequently and often get involved with playing "spot the shopper." This also has a positive side effect in that employees begin treating everyone as the potential mystery shopper. The strangest argument against a poor report is "I knew that was the shopper!" If this were the case, then why didn't the employee go out of their way to make sure the experience was positive?

### Who are the mystery shoppers?

Almost anyone can be a mystery shopper. Mystery shoppers are regular people, typically working part-time as either independent contractors or employees, who are trained to conduct performance evaluations. For consumers, mystery shopping is an intriguing concept that allows them to play an important role in improving customer service while earning some part-time income and benefits.

Shoppers are recruited through classified advertising or referrals. Recently it has become more difficult to recruit qualified, reliable shoppers, thanks to numerous scam operations (see p. 18). Due to these scams many applicants today are seeking unrealistic opportunities to get rich quick or get free big-ticket merchandise such as TVs. Most good shoppers are genuinely seeking to play a role in improving customer service rather than an income opportunity.

Most shopping companies will have candidates complete an application, at no cost, and match shoppers with assignments based on the clients' typical customer profile. For instance, when shopping apartments, there are luxury apartments as well as low-income housing. How believable would it be to send a low-income shopper to a luxury apartment? Also there may be special requirements for the shop, for example, when evaluating optical stores a shopper must wear glasses to complete a transaction.

The training mystery shoppers receive depends on the client's objectives and the company that hires them. In most cases, shoppers are trained over the phone and through written instructions. Shoppers may be trained in person or required to perform test shops to evaluate their skills before doing an actual assignment.

### Differs from other research

Mystery shopping is somewhat different compared with

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other marketing research methods. It requires more involvement with the training and operations departments than the marketing or advertising departments of clients. It is more labor intensive. It is both qualitative and quantitative. It's research by observation.

Shopping programs require a tremendous effort in recruiting, qualifying, scheduling, training and managing shoppers. In addition, individual shopper reports must be distributed, collected, reviewed, tabulated and summarized in a short time frame. Shopping reports are used by all levels of a client company, and distributing the summary reports in a timely manner is critical.

### Who provides mystery shopping services?

Many different types of companies provide mystery shopping services, including marketing research firms, training companies, private investigators, security providers, merchandisers, temporary agencies, insurance agencies and companies that specialize only in mystery shopping. There are well over 500 established companies in the U.S. that provide mystery shopping services. Most are regional or local, though there are many that conduct shopping on a national or international basis.

When choosing a mystery shopping service provider, look for a firm that:

- assists in developing a custom report based on specific client objectives and employee training guidelines;
- has a large pool of shoppers to meet the client's needs;
- can qualify and train shoppers to perform specific evaluations;
- can provide fast turnaround on evaluations and summary reports;
- has experience with or knowledge of the client's industry (many shopping companies specialize in particular industries);
- has a good reputation with their clients and shoppers;
- does not charge a fee for shoppers to apply;
- guarantees the quality of their service and shows a willingness to provide a re-shop or credit for any suspect shops.

### How much does mystery shopping cost?

Costs for mystery shopping can vary considerably. The cost depends on the complexity of the shop, difficulty in recruiting, incentives for shoppers (such as free meals), frequency and quantity of shops, length of reports and reporting distribution requirements. The costs generally range anywhere from \$25 to \$125, with an average fee of around \$65 per shop.

There are some basic expenses involved with mystery shopping including recruiting, printing, long distance, postage/freight, field labor, management, data entry and analysis. Some companies charge additional fees to set up a program or provide summary reports. However, most companies seem willing to absorb these costs with an ongoing, frequent program. Any required purchase expenses also must be

calculated into the overall cost of a program. To allow for flexibility when purchases are required, shoppers should be given an option to either return the merchandise (which could be used as another point of evaluation), or keep the merchandise at a minimal or reduced cost (such as 50 percent on clothing). Of course meals cannot be returned and are typically considered as part of a shoppers' benefits.

### What makes a shopping program effective?

Below are key aspects to an effective shopping program.

- The program must be based on clearly defined objectives with emphasis on existing training, desired behaviors and standards compliance.
- Communicate the program widely among all employees. Let them know what is expected in their evaluation and what would qualify for a possible award. Share results with employees in a positive manner.
- Questionnaires, or evaluation forms, must be designed to provide objective, observational feedback with a system to allow for checks and balances. A mixture of open- and closed-ended questions with space for shoppers to suggest improvements is advised. Questionnaires should specify the behavior to be measured. Do not ask "Was the employee friendly, smiling, courteous and professional?" as the employee may be courteous, but not friendly and smiling. Break questions such as these into

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three different questions.

- Some questions may be more important than others. If using a scoring system, which is recommended, appropriate weighting of questions is critical. Some questions may not need to have points allocated to them at all, but may be necessary for the overall framing of the evaluation.

- Questionnaires should be easy for shoppers to complete and should include specific illustrations where necessary to clarify the point of evaluation.

- Category summaries make reporting easier to analyze and digest. A summary page with all category scores and location, shopper and date information is very helpful. Category scores are based on an accumulation of points from individual questions within each category. Categories may include areas such as telephone, physical appearance, product quality, greeting, understanding needs, suggestive selling, closing and follow-up.

- Recruit, qualify and train shop-

pers that closely match the clients' typical customer profile. Shoppers must be able to provide clear, complete and accurate evaluations.

- Provide shoppers with specific scenarios and clear written instructions. To ensure all shoppers are providing evaluations on the same issues, instruct all shoppers to ask for the same, or similar products and ask the same kinds of questions. At a minimum shoppers should be given training over the phone and through easy to follow written instructions. In

within 30 days of the shop — or much sooner if possible. Summary reports for each district, region, division, department, etc., must be easy to read and understand and also distributed in a timely manner.

- A shopping program should not be used as a one-time audit. An established, ongoing program, where employees know that any customer could be the mystery shopper, is more effective and objective than single shot audits.

### The future of mystery shopping

With the new technologies, mystery shopping is changing. The need for faster turnaround on shopping reports has resulted in service providers seeking more efficient ways to distribute and collect reports. Today many service providers have shoppers complete their evaluation forms on the Internet, by E-mail, through fax-on-demand or by telephone.

With the burgeoning competition among service providers, the call to form an industry association has grown louder. An association would need to incorporate the various kinds of mystery shopping providers, set standards for dealing with clients and shoppers, act as a unified voice to counter damaging mystery shopping scams and voice industry concerns regarding use of independent contractors, licensing regulations and government control.

More companies are discovering mystery shopping and developing new ways to use mystery shopping programs to improve their business. Several new uses include problem shopping, where the shopper presents a problem that the employee must solve; using shoppers as coaches, where after the shop is completed, the shopper then consults with the store manager on their observations and suggested improvements; and having employees showcased, i.e., when the shopper presents an award, it is an event celebrated throughout the store. No doubt, there will continue to be more growth and innovation of mystery shopping programs. □

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*To take Big Brother out of the picture, it has become more popular to use mystery shopping as a vehicle for presenting awards — either on the spot or as part of an overall bonus program. The net effect of awards-based mystery shopping is that it has become much more important to employees and managers, which is a good thing.*

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addition, try to schedule all shops to be completed during equal periods, i.e., weekends or weekday evenings only.

- Run quality control checks on completed evaluation reports before distribution to the client. Every report must be checked for validity, accuracy, consistency and objectivity. Shoppers may need to be contacted to confirm their evaluation reports.

- Reporting on a timely basis. A shopping report has a short shelf life. The individual store reports must be tabulated and distributed to the stores

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## Mystery shopping scams

continued from p. 18

prospect of being paid to act as mystery shoppers. Recruiting shoppers is an important aspect of mystery shopping, as service providers always need more people to help them complete

their evaluations. It is unfortunate that the media now associates these recruiting scams with mystery shopping and the Better Business Bureau has now decided that all mystery shopping is nothing but a scam.

The FTC is taking more positive action by preparing consumer edu-

cation information regarding mystery shopping. If you have information you would like to provide for this soon-to-be released report please contact Laurie Meehan of the FTC Bureau of Consumer Protection in Washington, D.C. at 202-326-3755 or fax to 202-326-3395. □

### An excerpt from a letter distributed this past fall to MRA members:

In January 1996 many MRA members began to receive calls from the public seeking employment in the field of mystery shopping. However, most - if not all - of the members who were contacted do not conduct mystery shopping. Even so, their company was listed as a source of mystery shopping employment.

MRA immediately became concerned about the possibility of consumer fraud or false advertising. Therefore, in September we requested that members send us any information they received about such calls. We discovered that many of these calls result from listings in booklets that are purchased by the potential employees.

As a result of the information you provided to us, we have uncovered the booklets' publisher. We have also talked with the Attorney General of the State of Connecticut on your behalf. He, in turn, met via conference call with the attorneys general of 12 other states. Together, they are now conducting an in-depth investigation into this potential mystery shopping fraud. In addition, we have worked with our legal counsel to provide you with the following information.

If you are faced with this situation, we request you take the following steps immediately:

1. Find out as much information as you can about how the caller got your company's name and phone number.
2. Tell the caller clearly that this is misleading advertising and that you do not hire mystery shoppers (if that is the case); encourage the caller to contact the Better Business Bureau in their area and complain.
3. Obtain the address of the publisher of the booklet and write to them requesting the publisher remove your name from their booklet.
4. Notify the Attorney General of your state. Send as much information as you can to support your complaint.
5. Notify MRA headquarters of your actions by sending a copy of your correspondence and any other information you discover.

Note: There are several new services that do appear to deliver what they promise. These include referral services such as The National Mystery Shopper Directory. Essentially what differentiates this service from fraudulent operators is that they do not create false expectations for consumers and they help service providers by providing lists of shoppers to the companies rather than selling lists of companies to shoppers.

The National Mystery Shopper Directory was started by Michelson & Associates, Inc. as a way to connect their experienced shoppers who desired more work with other companies. They market the service by direct mail to their in-house database and do not advertise for new recruits in newspapers. Shoppers who choose to list in this directory pay a low one-time fee to have their application information sent quarterly to over 400 shopping service providers. Shoppers who pay for listings are offered a 100% money back satisfaction guarantee. Several hundred service providers now actively use this directory their own recruiting.

Mark Michelson, founder, states the following regarding The National Mystery Shopper Directory: "I started the directory as a response to numerous requests from our shoppers to get more work. Once we use a shopper for a specific location, they cannot do that shop again. Unfortunately we use up many of our best shoppers. The idea for the directory came when I began speaking with other service providers who asked if we could provide them with shoppers. The directory is intended to provide qualified, experienced shoppers who have completed work for us to other reputable service providers. The directory is funded entirely by the shoppers who pay for listings and there is no cost for subscribers to receive or use the directory in their recruiting. We do not charge applicants anything to apply as a shopper with Michelson & Associates alone. However, if they choose to be listed in the directory we ask for a minimal one-time fee to cover the distribution expenses, which is fully refundable if they are not satisfied. The primary benefit I have received from this venture has been the relationships I have been able to create with other service providers."

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Doyle Research Associates  
Market Navigation, Inc.

Medical Marketing Research, Inc.  
MedProbe, Inc.  
Olson Aycock, All Points Research

## TOURISM/HOSPITALITY

Research Data Services, Inc.

## TOYS/GAMES

Fader & Associates  
Greenleaf Associates, Inc.  
KidFacts Research

## TRANSPORTATION SERVICES

Nancy Low & Associates, Inc.  
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## UTILITIES

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Fader & Associates  
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## WEALTHY

Brittain Associates  
The Deutsch Consultancy  
Strategy Research Corporation

## YOUTH

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Outsmart Marketing

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QMRR Focus Group  
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**MARKETING RESEARCH**  
*Review*

# 1996 QMRR Story Index

## CASE HISTORIES

### JANUARY

Mystery shopping: "Refining service—Mystery shopping fuels Texaco's employee excellence program"

### FEBRUARY

Employee research: "Advising the advisors—Redesigned questionnaire improves response rates, helps American Express Financial Advisors assess effectiveness of client acquisition techniques"

Qualitative research: "A bit of Tomorrowland today—Research with tourists and travel agents measures viability of high-speed train in Orlando"

### MARCH

Advertising research: "More, better, faster—When it's time to pitch new business, Ammirati Puris Lintas depends on videoconferenced focus groups"

### APRIL

Quantitative research: "TQM comes to Main street—Lakewood, Ohio uses research to assess the state of the city"

### MAY

Quantitative research: "Surveying the friendly skies—In-flight satisfaction research keeps United Airlines customer oriented"

### JUNE/JULY

Interactive group research: "Without reservations—Respondents in interactive groups approve Best Western's ambitious ad campaign"

### OCTOBER

Customer satisfaction research: "A united effort—Satisfaction research puts Twin Cities United Ways in touch with their core donors"

Customer satisfaction research: "Customer value measurement"

### NOVEMBER

International research: "Leaping the barriers of time and distance—VeriFone conducts wide-ranging international research project to develop new product concept"

International research: "Conducting research outside the United States: a primer"

### DECEMBER

Qualitative research: "For art's sake—Focus groups, phone survey give North Carolina arts councils valuable audience information"

## TECHNIQUE DISCUSSIONS

### JANUARY

Mystery shopping: "Mystery shopping for the financial services industry—then and now"

Mystery shopping: "How to ensure an objective mystery shop"

Ethnic research: "Q & A with Felipe Korzenny"

Ethnic research: "The myths of ethnic marketing and research"

Ethnic research: "Spanish-language advertising boosts loyalty"

### FEBRUARY

Telephone interviewing: "Let's put survey errors into perspective"

### MARCH

Advertising research: "How researchers can be effective partners in the advertising development process"

Advertising research: "Creative testing: beat the systems with four simple rules"

Advertising research: "The new communications criteria in advertising research"

Advertising research: "Super Bowl advertising: What really works?"

The future of research: "Marketing research: On the threshold of opportunity? A roundtable discussion on the past, present and future of research"

### APRIL

Business-to-business research: "Key measurement programs for a customer satisfaction system in a business-to-business market"

Business-to-business research: "Conjoint analysis valuable in business-to-business research"

Business-to-business research: "Customer loyalty: The competitive edge beyond satisfaction"

Business-to-business research: "Adjusting buyer attitude data for business cycle variation—Buyer attitudes are as sensitive to changes in the economic environment as sales volume"

Business-to-business research: "Demystifying international industrial marketing research"

Business-to-business research: "New dimensions in business-to-business research"

### MAY

Telephone research: "Confessions of a telephone focus group skeptic"

On-line research: "The Internet: A new opportunity for marketing research firms"

Quantitative research: "Fax versus mail in gathering data: An analytical study"

### JUNE/JULY

Syndicated/omnibus research: "Omnibus research in Asia has unique demands"

Syndicated/omnibus research: "Omnibus study looks at senior lifestyles"

Health care research: "Physician focus groups revisited"

Qualitative research: "Facilitating focus groups"

Qualitative research: "A moderator's view of focus group videoconferencing"

Qualitative research: "Can't we all just get along? Bringing researchers and ad agency folks together"

Mail research: "In defense of the mail survey"

### OCTOBER

Customer satisfaction research: "Profiting from customer value analysis"

Customer satisfaction research: "Measuring your competitive strength"

Customer satisfaction research: "Is the market research industry failing its TQM clients?"

Qualitative research: "The focus group bill of rights"

Customer satisfaction research: "From the Publisher: This satisfaction 'research' left the customer unsatisfied"

### NOVEMBER

International research: "An introduction to marketing research in China"

International research: "Selecting a research firm in a foreign country"

Mail research: "Pain-free mail intercepts—A little time spent making questionnaires interviewer-friendly can really pay off"

### DECEMBER

Qualitative research: "Rethinking focus group reporting: dynamic debriefing—How to wean yourself from written focus group reports that take too long, cost too much and don't go far enough"

Qualitative research - teens: "More than DOOM and gloom—Teens respond well to on-line research on games"

Qualitative research: "Qualitative introductions: an annotated script for meeting and welcoming focus group respondents"

Qualitative research: "Choosing the ideal focus group facility"

Qualitative research: "Qualities of a beginning moderator"

Qualitative research: "How and why to research word of mouth"

Qualitative research: "Making new friends—How to optimize qualitative research with seniors"

Qualitative research - kids: "Focus groups with kids . . . imagine"

Qualitative research - kids: "Children's qualitative research—past and present"

## DATA USE

### JANUARY

"Vexed by significance testing? Try the bootstrap technique"

### FEBRUARY

"If you hate statistics . . ."

### MARCH

"Helping managers understand the value of conjoint"

### APRIL

"Correspondence analysis: The big picture"

### MAY

"Windows 95: Should you upgrade now?"

### OCTOBER

"Customer satisfaction and choice modeling: a marriage"

### NOVEMBER

"Simulation, intuition and jargon"

## TRADE TALK

### FEBRUARY

"Job hunter market thyself" (an interview with a research employment recruiter)

### MARCH

"The inside scoop on marketing to teens" (a review of the book *Wise Up to Teens*)

### APRIL

"Midwestern farmers express troubling view of research" (a look at a study of farmers' attitudes toward marketing research)

### MAY

"Meeting launches local MRA chapter"

### JUNE/JULY

"We have lift-off: QMRR launches into cyberspace" (a look at the new QMRR Web site)

### NOVEMBER

"War stories and ESOP tales"

1997

# Directory of mystery shopping firms

This is our second 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 (nation, 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.

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## Codes

B - Business/Industry  
 E - Entertainment  
 F - Financial Services  
 R - Restaurant/Fast Food  
 RT - Retail  
 S - Services



### ACG Research Solutions

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 St. Louis, MO 63105  
 Ph. 314-726-3403  
 Fax 314-726-2503  
 Vicki Savala, President  
 Nationally - Full Service  
 R, RT

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(See advertisement on p. 56)

Accurate Data Marketing, Inc.  
 4267 Commercial Way  
 Glenview, IL 60025  
 Ph. 847-390-7777  
 Fax 847-390-7849  
 Barbara Dorfman, President  
 Locally - Data Collection/Field Svc.  
 B,E,F,R,RT,S

Action Research  
 3 Baldwin Ave.  
 S. Burlington, VT 05403  
 Ph. 802-862-4370 or 800-545-7168  
 Fax 802-862-2349  
 E-mail: jfong@actionr.com  
 James Fong, President  
 Regionally - Full Service  
 F,R,RT

AIS Market Research  
 2070 N. Winery  
 Fresno, CA 93612  
 Ph. 800-548-8127 or 209-252-2727  
 Fax 209-252-8343  
 Kimberly Rudolf, Manager  
 Regionally - Data Collection/Field Svc.  
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American Public Opinion Survey & Market Research Corp.  
 1320 S. Minnesota Ave.  
 Sioux Falls, SD 57105-0625  
 Ph. 605-338-3918  
 Fax 605-334-7473  
 Warren R. Johnson, President  
 Nationally - Full Service  
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Ask America Market Research (Ask Florida)  
 27 S.E. 24th Ave.  
 P.O. Box 2682  
 Pompano Beach, FL 33062  
 Ph. 954-781-5700 or 888-266-7229  
 Fax 954-786-8611  
 Michael Pettengill  
 Regionally - Full Service  
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Assistance In Marketing, Inc.  
 101 E. Chesapeake Ave.  
 Towson, MD 21286  
 Ph. 410-337-5000  
 Fax 410-337-5089  
 E-mail: AIM@aim.charm.net  
<http://www.charm.net/~aim/>  
 Carl Iseman, President  
 Nationally - Data Collection/Field Svc.  
 E,F,R,RT,S



### Audits & Surveys Worldwide

650 Avenue of the Americas  
 New York, NY 10011  
 Ph. 212-627-9700  
 Fax 212-253-5468  
 Fred Winkel, Sr. Vice President  
 Nationally - Full Service  
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Audits & Surveys Worldwide is one of the world's largest integrated market research firms having worked with most of the Fortune 1000 corporations for over 43 years. Our local market field force serves our clients' needs through a worldwide network of six national and four international offices that supervise our operations in over 70 countries. The Customer Satisfaction Division offers a full range of customer satisfaction research services: mystery shopper studies; customer satisfaction studies; Outbound and inbound; employee satisfaction studies; benchmarking and competitor comparison studies; full qualitative services.

(See advertisement on p. 57)

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 580 White Plains Rd.  
 Tarrytown, NY 10591  
 Ph. 914-332-5300  
 Fax 914-631-8300  
 E-mail: kpermut@behavioralanalysis.com  
 Kate Permut, V.P. Marketing  
 Nationally - Full Service  
 F



Chromalloy Plaza  
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 63105

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Clovis, CA 93612  
Ph. 209-298-7557  
Fax 209-298-5226  
Patrick Bartels, Vice President  
Nationally - Data Collection/Field Svc.  
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Frances Bauman Associates  
23 Girard St.  
Marlboro, NJ 07746  
Ph. 908-536-9712  
Fax 908-536-3256  
Frances Bauman, Owner  
Regionally - Data Collection/Field Svc.  
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Bay Area Research  
9936 Liberty Rd.  
Randallstown, MD 21133  
Ph. 410-922-6600  
Fax 410-922-6675  
E-mail: baya@erols.com  
Tamara Zwingelberg, President  
Regionally - Data Collection/Field Svc.  
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**BestMark**  
4915 W. 35 St., Ste. 206  
Minneapolis, MN 55416  
Ph. 612-929-2326  
Fax 612-922-2205  
E-mail: 76152.1536@compuserve.com  
Ann Jennings, President  
Nationally - Full Service  
B,E,F,R,RT,S

BestMark is a full service national market research company specializing in building customer satisfaction and loyalty through on-site and telephone mystery shopping. BestMark provides actionable data and proven management solutions for America's leading companies. BestMark offer services including customer satisfaction studies, loyalty positioning, comment card management, and incentive/recognition programs.  
(See advertisement on p. 71)

Beta One, Inc.  
Focus Facility Hartford  
270 Farmington Ave., Ste. 126  
Farmington, CT 06032  
Ph. 800-447-2382  
Fax 860-677-4967  
Paul Keene, V.P. Svc. Ops.  
Regionally - Data Collection/Field Svc.  
B,E,F,R,RT,S

Better Marketing Associates, Inc.  
P.O. Box 190  
Oaks, PA 19456  
Ph. 800-355-5040  
Fax 610-933-6071  
E-mail: bma@p3.net  
Peter Thorwarth, President  
Nationally - Full Service  
B,E,F,R,RT,S

The Blackstone Group  
360 N. Michigan Ave., Ste. 1501  
Chicago, IL 60601  
Ph. 312-419-0400  
Fax 312-419-8419  
Ashref Hashim, President  
Locally - Full Service  
B,E,F,R,RT,S

Capstone Research, Inc.  
623 Ridge Rd.  
Lyndhurst, NJ 07071  
Ph. 201-939-0600  
Fax 201-939-3037  
E-mail: capstone@village.ios.com  
<http://www.capstoneresearch.com>  
Harriet Gozali, Vice President  
Nationally - Full Service  
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 Winston-Salem, NC 27040  
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 Fax 910-765-1109  
 E-mail: cba@n.r.infi.net  
 Amy Anderson, Field Rsch. Mgr.  
 Nationally - Full Service  
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Certified Reports, Inc.  
 7 Hudson St.  
 P.O. Box 447  
 Kinderhook, NY 12106  
 Ph. 518-758-6400  
 Fax 518-758-6459  
 Frank Falkenhainer, Dir. of Sales & Svc.  
 Nationally - Full Service  
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**CHK-UR-SERV**  
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 Springfield, MO 65804  
 Ph. 417-882-5787  
 Fax 417-890-8259  
 E-mail: Randy@CHKURServ.com  
<http://www.CHKURServ.com>  
 Lori Radford, Vice President  
 Nationally - Data Collection/Field Svc.  
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CHK-UR-SERV will give you an invaluable picture of how your business is viewed from your customers eye. Our customized evaluation reports explain each experience in detail by high quality mystery shoppers. We offer nationwide coverage and a wide variety of supportive programs for any business that requires objective information by a mystery shopper.

*(See advertisement on p. 59)*



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 Van Nuys, CA 91407  
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 Fax 818-997-1049  
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*(See advertisement on p. 58)*

Connections, Inc.  
 3928 Montclair Rd., Ste. 230  
 Birmingham, AL 35213  
 Ph. 205-879-1255  
 Fax 205-868-4173  
 Rebecca V. Watson, President  
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Consumer Impressions, Inc.  
 1601 Dorchester Dr., Ste. 101  
 Plano, TX 75075  
 Ph. 972-867-9690  
 Fax 972-612-1485  
 Jodi Paul, President  
 Regionally - Full Service  
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Consumer Research Center  
 1370 E. Flamingo Rd., Ste. J  
 Las Vegas, NV 89119  
 Ph. 702-737-3272  
 Fax 702-737-1023  
 Buddy Goldbaum, President  
 Regionally - Data Collection/Field Svc.  
 E,F,R,RT,S

Crimmins & Forman Market Research  
 29955 Southfield Rd.  
 Southfield, MI 48076  
 Ph. 810-569-7095  
 Fax 810-569-8927  
 E-mail: CardF2@juno.com  
 Lois Forman or Paula Crimmins  
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Cross Financial Group  
 2418 Ammon Ave., Ste. 100  
 Lincoln, NE 68507  
 Ph. 800-566-3491  
 Fax 402-441-3136  
 E-mail: crossfin@aol.com  
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Customer Perspectives  
 213 W. River Rd.  
 Hookset, NH 03106-2628  
 Ph. 603-647-1300  
 Judith Ann Hess, Partner  
 Nationally - Full Service  
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Cynthia Deutsch Interviewing  
 323 Southampton B  
 West Palm Beach, FL 33417  
 Ph. 561-471-8614  
 Fax 561-471-8614  
 Cynthia Deutsch, Owner  
 Locally - Data Collection/Field Svc.  
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# 1997 MYSTERY SHOPPING DIRECTORY

DCW Interviewing Service  
2313 Ashdown Dr.  
Bossier City, LA 71111-5917  
Ph. 318-742-0126  
Fax 318-741-3071  
John Webb, Manager  
Locally - Data Collection/Field Svc.  
B,F,R,RT

Dennis Research Service, Inc.  
3502 Stellhorn Rd.  
Ft. Wayne, IN 46815  
Ph. 219-485-2442  
Fax 219-485-1476  
Pat Slater, Director  
Locally - Data Collection/Field Svc.  
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Jeanne Drew Surveys  
5005 1/2 - 34th Ave. S.  
Minneapolis, MN 55417  
Ph. 612-729-2306  
Fax 612-729-7645  
Jeanne Drew, President  
Locally - Data Collection/Field Svc.  
E,R,RT



**DSG Associates, Inc.**  
2110 E. First St., Ste. 106  
Santa Ana, CA 92705  
Ph. 714-835-3020  
Fax 714-835-6506  
E-mail: dsga@deltanet.com  
Carol Hoeft, Director of Operations  
Mike Guido, Director of Operations  
Nationally - Full Service  
E,F,R,RT,S

DSG Associates, Inc. ensures mystery shoppers and guest intercepts with the greatest possible reliability, actionability, integrity and fast turnaround. A combination of DSG experience and innovation has created a specialty system unmatched in excellence and value for a wide variety of multi-location businesses, including restaurants, retail stores, apartment leasing agents, vending machine sales and service stations. Clients can customize evaluation forms and decide how the results will be reported.

(See advertisement on p. 59)

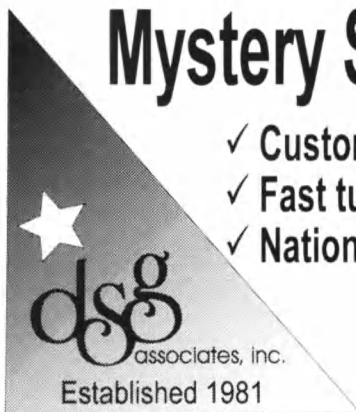
C.B. DuPree Associates  
299 Highbridge St.  
Fayetteville, NY 13066  
Ph. 315-637-2321  
Fax 315-637-2122  
Kay DuPree, Owner/Manager  
Regionally - Data Collection/Field Svc.  
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Eagle Research - Atlanta  
One Dunwoody Park, Ste. 128  
Atlanta, GA 30338  
Ph. 800-281-5397  
Fax 404-671-9708  
E-mail: eaglegrp@rmii.com  
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Nationally - Full Service  
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Eagle Research - Denver  
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Denver, CO 80227  
Ph. 800-281-5397  
Fax 303-980-2270  
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- Ohio
- Oklahoma
- Tennessee
- Texas

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## Elrick & Lavidge

### Elrick and Lavidge

1990 Lakeside Pkwy., 3rd fl.  
 Tucker, GA 30084  
 Ph. 770-621-7600  
 Fax 770-621-7666  
 E-mail: elavidge@mindspring.com  
<http://www.elavidge.com>  
 Gary Harper, Vice President  
 Jeff Hughes, Account Executive  
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For 30+ years Elrick & Lavidge has built a solid reputation as a leader in the mystery shopping industry, providing clients with valuable data concerning customer service, product knowledge, store appearance, competitive activity, pricing, and point-of-sale evaluations. E&L custom designs programs to meet your company's objectives and needs with a wide range of capabilities including: 28,000 shoppers nationwide, an experienced staff, custom summary tabulations and exemplary service. (See advertisement on p. 61)

Edward Epstein & Associates, Inc.  
 6800 Jericho Tpke.  
 Syosset, NY 11791  
 Ph. 516-921-7500  
 Fax 516-364-4683  
 Ed Epstein, President  
 Nationally - Full Service  
 B,F,RT

Fenton Swanger Consumer Research, Inc.  
 14800 Quorum Dr., Ste. 250  
 Dallas, TX 75240  
 Ph. 972-934-0707  
 Fax 972-490-3919  
 E-mail: FENTNSWAGR@aol.com  
 Rhonda Querner, Acct. Exec.  
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Field Dynamics Marketing Research  
 17547 Ventura Blvd., Ste. 308  
 Encino, CA 91316  
 Ph. 818-783-2502  
 Fax 818-905-3216  
 E-mail: FIELDDDYNAM@aol.com  
 Tony Blass, President  
 Nationally - Data Collection/Field Svc.  
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 Delafield, WI 53018  
 Ph. 414-646-7034  
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 1100 Lake St., Ste. 60  
 Oak Park, IL 60301  
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 San Diego, CA 92122  
 Ph. 619-550-3878  
 Fax 619-550-3875  
 Joan Pietila, President  
 Nationally - Data Collection/Field Svc.  
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Gilmore Research Group  
 2324 Eastlake Ave. E., Ste. 300  
 Seattle, WA 98102-3306  
 Ph. 206-726-5555  
 Fax 206-726-5620  
 Cheryl Nicholl, Vice President  
 Regionally - Full Service  
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 729 N.E. Oregon St., Ste. 150  
 Portland, OR 97232  
 Ph. 503-236-4551  
 Fax 503-731-5590  
 Sharon Marson, Outside Field Mgr.  
 Denise Bauman, Custom Rsch. Specialist  
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Polly Graham & Associates, Inc.  
 3000 Riverchase Galleria, Ste. 310  
 Birmingham, AL 35244  
 Ph. 205-985-3099  
 Fax 205-985-3066  
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Pat Henry Market Research, Inc.  
 230 Huron Rd. N.W., #100.43  
 Cleveland, OH 44113  
 Ph. 216-621-3831  
 Fax 216-621-8455  
 Mark Kikel, V.P. of Operations  
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Herron Associates, Inc.  
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 Greenwood, IN 46143  
 Ph. 317-882-3800 or 317-236-0420  
 Fax 317-882-4716  
 E-mail: Herron@in.net  
 Sue Nielsen, Vice President  
 Regionally - Full Service  
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Highsmith-Charnock Interviewing Service, Inc.  
 2912 Sussex Rd.  
 Augusta, GA 30909-3532  
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 Fax 706-733-9548  
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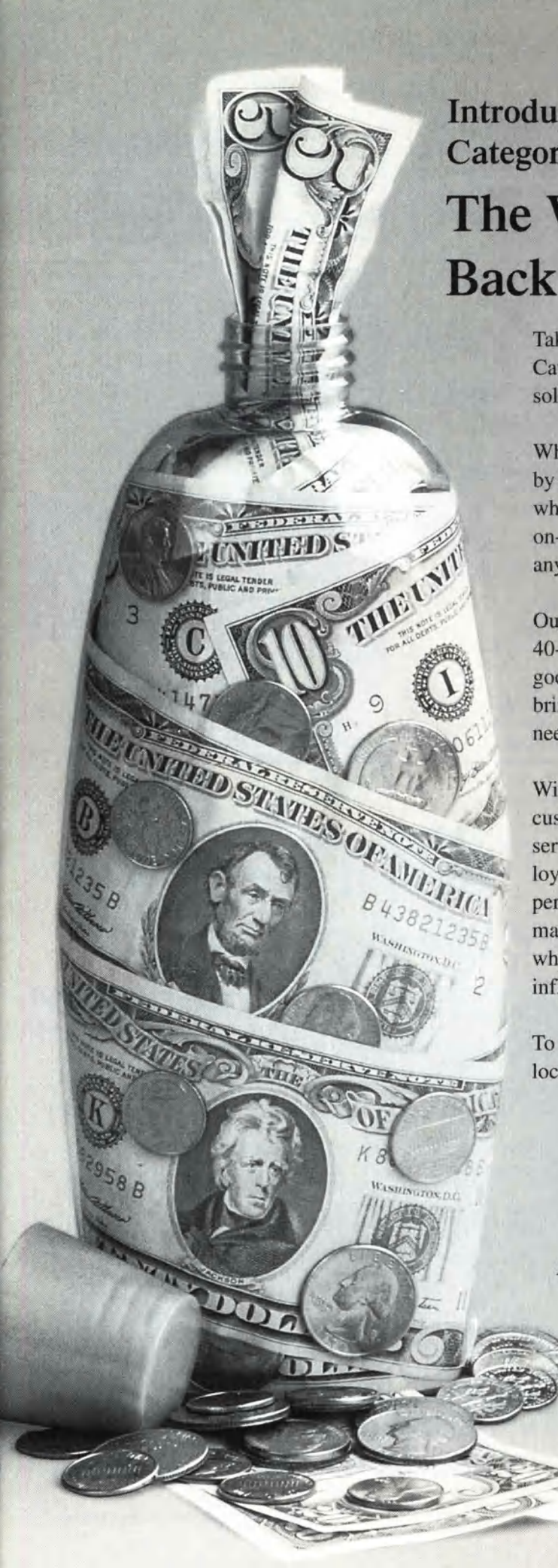
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 40 Eglinton Ave. E.  
 Toronto, ON M4P 3A2  
 Canada  
 Ph. 416-440-0310 ext. 31  
 Fax 416-440-1768  
 E-mail: imi@istar.ca  
 Don Mayo, Vice President  
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Issues and Answers Network, Inc.  
 5151 Bonney Rd.  
 Virginia Beach, VA 23462  
 Ph. 757-456-1100  
 Fax 757-456-0377  
 E-mail: INFO@ISSANS.COM  
 Carla Lindemann, Exec. Vice President  
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Jackson Associates, Inc.  
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 Atlanta, GA 30328  
 Ph. 770-394-8700  
 Fax 770-394-8702  
 E-mail: research@jacksonassociates.com  
<http://www.jacksonassociates.com>  
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 Dean DeClue, Field Director  
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JRP Marketing Research Services  
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 Ph. 610-565-8840  
 Fax 610-565-8870  
 Paul R. Frattaroli, President  
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Keystone Marketing Research  
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Kansas City 816.221.8117 New York 201.599.0755  
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 RT - Retail  
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Kirk Research Services, Inc.  
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 Jacksonville, FL 32207  
 Ph. 904-858-3200  
 Fax 904-858-3204  
 Rebecca Kirk, Vice President  
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 San Juan, PR 00936-1529  
 Puerto Rico  
 Ph. 787-753-9090  
 Fax 787-754-6590  
 Stanford Klapper, Chairman  
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KLD Marketing Research  
 5 N. Washington St.  
 Valparaiso, IN 46383  
 Ph. 219-464-3997  
 Fax 219-464-7011  
 E-mail: 40CKLD@aol.com  
 Reva Hauber, Field Director  
 Regionally - Data Collection/Field Svc.  
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L.A. Research, Inc.  
 9010 Reseda Blvd., Ste. 109  
 Northridge, CA 91324  
 Ph. 818-993-5500  
 Fax 818-993-5664  
 Adrienne Goldbaum, President  
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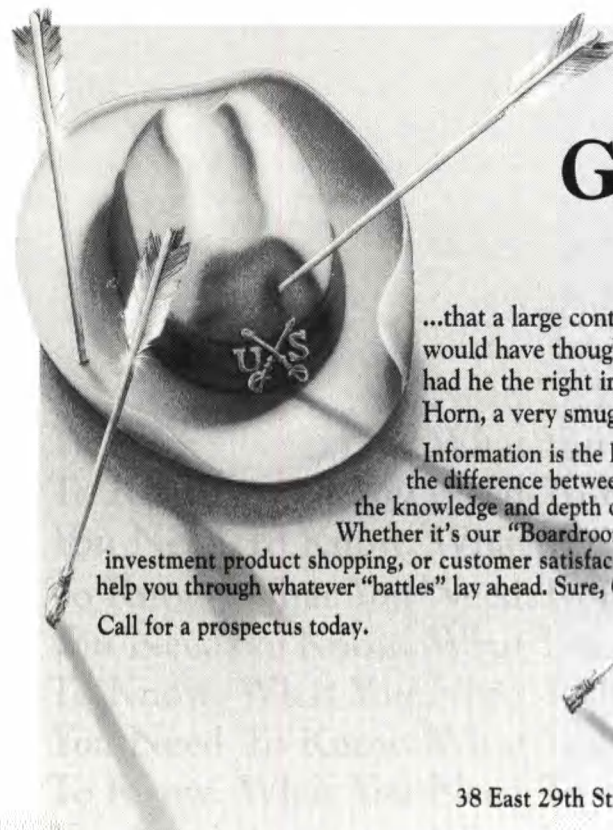
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 Ph. 212-889-5941  
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 Houston, TX 77036  
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Sherrri Bernard, Field Director  
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 (See advertisement on p. 43)

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Floyd Thigpen, President  
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Brenda Chartoff, President  
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Fax 603-883-1119  
Joan Greene, President  
Regionally - Data Collection/Field Svc.  
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Fax 205-985-3346  
E-mail: NSRJ@aol.com  
Amy June Wilhite  
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Raleigh, NC 27607  
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Fax 319-322-1370  
E-mail: PERMARRES@aol.com  
Patricia E. Duffy, President  
Regionally - Data Collection/Field Svc.  
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Fax 847-390-8885  
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*(See advertisements on pp. 21, 65)*

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Dan Prince, President  
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 Cleveland, OH 44128  
 Ph. 216-464-5240  
 Fax 216-464-7864  
 Mary Ann Sheets, Field Director  
 Locally - Data Collection/Field Svc.  
 F,R,RT

Rossow Interviewing  
 2713 15th Ave. N.  
 Ft. Dodge, IA 50501  
 Ph. 515-576-6464  
 Fax 515-576-5454  
 Clarice Rossow, Owner/Manager  
 Regionally - Data Collection/Field Svc.  
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Savitz Research Center, Inc.  
 13747 Montfort Dr., Ste. 111  
 Dallas, TX 75240  
 Ph. 972-386-4050  
 Fax 972-450-2507  
 Harriet E. Silverman, Vice President  
 Locally - Data Collection/Field Svc.  
 B,E,R,RT,S



**Schlesinger Associates, Inc.**  
 Executive Plaza, Ste. 400  
 10 Parsonage Rd.  
 Edison, NJ 08837  
 Ph. 908-906-1122  
 Fax 908-906-8792  
 E-mail: sasmkres@aol.com  
 Steven Schlesinger, President  
 Nationally - Data Collection/Field Svc.  
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Schlesinger Associates has been conducting mystery shopping for over 20 years. We have conducted mystery shops in banks, restaurants, retail establishments, automobile dealerships, etc. We have over three hundred mystery shoppers available across the country.  
*(See advertisement on p. 66)*

Seaport Surveys, Inc.  
 34 Cliff St.  
 New York, NY 10038  
 Ph. 212-608-3100 or 800-347-2662  
 Fax 212-608-4966  
 E-mail: jkick@biddeford.com  
 Andrea Waller, President  
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 Portland, ME 04101  
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 Fax 207-756-7777  
 E-mail: jkick@biddeford.com  
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Secret ShopNET  
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 Calgary, AB T2P 3H7  
 Canada  
 Ph. 403-261-5000 or 800-260-2686  
 Fax 403-261-4999  
 E-mail: salesdept@secretshopnet.com  
<http://secretshopnet.com>  
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 Wilmington, DE 19808  
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 Fax 302-998-3099  
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 Lincoln, NE 68516  
 Ph. 402-434-5000  
 Fax 402-434-5006  
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 Atlanta, GA 30346-1801  
 Ph. 770-393-1072 or 800-669-9939  
 Fax 770-668-0816  
 E-mail: shpckek@shopnckek.com  
<http://www.shopnckek.com>  
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*(See advertisement on p. 67)*



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 Review



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Fax 612-595-0210  
E-mail: JGSOS@secretshop.com  
<http://www.secretshop.com>  
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Fax 716-334-9423  
Marion Simon, President  
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**Sinclair Service Assessments, Inc.**  
10715 Gulfdale, Ste. 140  
San Antonio, TX 78216-3633  
Ph. 210-979-6000 or 800-880-3111  
Fax 210-979-6677  
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Fax 707-939-6730  
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New Orleans, LA 70112  
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Linda DeCuir, Research Coord.  
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St. Louis, MO 63131  
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Fax 314-692-2427  
E-mail: SURVEYS4U@aol.com  
Trish Dunn, Partner  
Kathi Dunn, Dir. of Ops.  
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Buffalo, NY 14223  
Ph. 716-876-6450  
Fax 716-876-0430  
E-mail: sservice@surveyservice.com  
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**Taylor Research**

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Glenda Terrell, President  
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WestGroup Research  
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Phoenix, AZ 85014  
Ph. 602-264-4915 or 800-999-1200  
Fax 602-631-6844  
E-mail: askarizona@westgroupresearch.com  
Beth Aguirre, Project Director  
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St. Paul, MN 55104  
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## National Mystery Shopping

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

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### DSG Associates, Inc.

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Fogerty Group, Inc.

Pat Henry Market Research, Inc.

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### Barry Leeds & Associates, Inc.

### Maritz Marketing Research, Inc.

Market Dynamics Research Group

Market Monitor, Inc./Service Monitor

Market Trends Pacific, Inc.

Marketing Solutions Corporation

McGladrey & Pullen, LLP

MDI Research

Meyers Research Center

### Michelson & Associates, Inc.

### MPS Research, Inc.

National Field & Focus, Inc.

Perceptive Market Research, Inc.

### The Performance Group (PGI Research)

Pinkerton Shopping Services

### Quality Controlled Services

Quick Test

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Secret ShopNET (Canada)

Service Research Corp.

### Shop 'n Chek, Inc.

Sights On Service, Inc., DBA Secret Shopper

### Sinclair Service Assessments, Inc.

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## Regional Mystery Shopping

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

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Polly Graham & Associates, Inc.

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L.A. Research, Inc.

Opinions of Sacramento

### Connecticut

Beta One, Inc., Focus Facility Hartford

### Delaware

Keystone Marketing Research

### Florida

Ask America Market Research

Kirk Research Services, Inc.

Mar's Surveys

Professional Research Group

### Georgia

Highsmith-Charnock Interviewing Service, Inc.

P V R, Inc.

### Iowa

PMR-Personal Marketing & Research, Inc.

Rossow Interviewing

### Illinois

Marketing Advantage Research Consultants, Inc.

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KLD Marketing Research

### Louisiana

Southern Spectrum Research, Inc.

### Maryland

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Carol Max Marketing Services, Inc.

Superior Surveys of St. Louis, Inc.

### Nevada

Consumer Research Center

### New Hampshire

New England Interviewing, Inc.

### New Jersey

Frances Bauman Associates

### New York

C.B. DuPre Associates

Marion Simon Research Service, Inc.

Surveys Unlimited, Inc.

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Gilmore Research Group

### Tennessee

Prince Market Research

### Texas

Consumer Impressions, Inc.

Mar's Surveys of Texas

Marketing Network International

Merchandising Specialists

### Virginia

Issues and Answers Network, Inc.

### Vermont

Action Research

### Washington

Gilmore Research Group

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

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### Birmingham, AL

New South Research

TWM Research Group, Inc.

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PWI Research

## **Milwaukee, WI**

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Seaport Surveys, Maine

## **Raleigh/Durham, NC**

NorTex Research Group/Raleigh

## **San Diego, CA**

Taylor Research, Video Conferencing Center

## **San Francisco Bay/San Jose, CA**

Sonoma Research, Inc.

## **Shreveport, LA**

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## **Washington, DC**

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## Research Industry News

continued from p. 21

which contains data on the health attitudes, conditions, medication uses and lifestyles of over 1.2 million 55+ households. The ultimate goal of the project is to track mature Americans' experiences with and attitudes toward the disease. The survey will be updated annually.

**Paria Group** has opened a new data collection facility and corporate office at 581 West 1600 North, Orem, Utah, 84057, featuring 200 CATI stations. Phone 801-226-8200. Fax 801-226-4819.

**Information Resources, Inc.**, Chicago, announced that A.C. Nielsen Company signed an extensive Undertaking with the European Commission agreeing to halt contractual practices which IRI claimed had hampered its entry into European markets. The action came in response to the Commission's Statement of Objections issued to Nielsen in May 1996 regarding various anti-competitive activities. IRI had contended that those practices were pursued by Nielsen as part of an intentional and unlawful strategy aimed at preventing IRI from establishing a competitive position in Europe and eliminating IRI as a competitor.

**Kaufman Associates** has moved to 6426 Wakeforest St., Houston, Texas, 77005. Phone 713-621-8434. Fax 713-661-3348.

**Applied Decision Analysis Inc.**, Menlo Park, Calif., has opened ADA Europe to support a growing European customer base. Yann Bonduelle, a principal at ADA and vice president of international operations, will manage ADA Europe. The address of the new office is 22 The Green, Richmond, Surrey TW9 1PX, U.K.

**Rockwood Research** has moved to 651 Campus Drive, New Brighton, Minnesota, 55112. The phone and fax numbers remain 612-631-1977 and 612-631-8198.

## Sales Offices

**Headquarters:** Evan Tweed, *Quirk's Marketing Research Review*, 8030 Cedar Ave. So., Ste. 229, Bloomington, Minn., 55425. Phone 612-854-5101. Fax 612-854-8191.

**West Coast:** Lane Weiss, Lane Weiss & Associates, 10 Black Log Rd., Kentfield, Calif., 94904. Phone 415-461-1404. Fax 415-461-9555.

## Classified Ads

### Minnesota/Upper Midwest MRA Program

On February 25, 1997 Beth Rounds, Senior Vice President of Custom Research, Inc. will be the guest speaker at the Upper Midwest MRA's winter meeting. Her presentation will be entitled, "Secrets of success from a Malcolm Baldrige Award winner". For more information contact Randi Luoto at 612-321-4582.

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- Pricing evaluation
- Product tests
- Project management
- Quality/sensory evaluation
- Q're editing/coding
- Report writing
- Sample design/selection
- SAS/SPSS programming
- Scanner/syndicated data
- Spec writing
- Statistical analysis
- Tab development



2961 N. Halsted, #130, Chicago, IL 60657

## Corrections

The November installment of "Data Use" contained an editing error. On page 15, in the third full paragraph, the first sentence should read: "Bear number two is deciding whether we want to use a two-sided or one-sided significance test."

Please note the correction to the following listing from the *1996-97 Researcher SourceBook*. On p. 279, the fax number for ABACO Marketing Research Ltd. should read 55-11-256-3982.

Due to an editing error, the photo credit for the cover of the December issue was accidentally omitted. The photo was supplied by Fieldwork, Inc., Chicago.

Please note the following addition to the December Focus Group Facilities Directory:

Market Inquiry  
5825 Creek Road  
Cincinnati, OH 54242  
Ph. 513-794-1088  
Fax 513-794-1176  
E-mail: NNCNoyes3435@aol.com  
Cathy Noyes, Managing Partner  
Location: Office building  
CR, OR, TK, VE  
1) 16x20 Obs. Rm. Seats 8



## Trade Talk

continued from p. 74

Many tables show data broken down by age, education, occupation, and race.

*The Official Guide to Racial and Ethnic Diversity* uses, primarily, data from the Census Bureau's Current Population Survey and the 1990 census to give readers information on Asians, Blacks, Hispanics, Native Americans and Whites. Each ethnic group has its own chapter, with sections on education, health, households and living arrangements, housing, income, labor force, population and wealth and spending. The final chapter draws on the National Opinion Research Center of the University of Chicago's 1994 General Social Survey for answers to attitudinal questions like "If your party nominated a black for president, would you vote for him if he were qualified for the job?" and "What do you think will happen as a result of more immigrants coming to this country?"

The same survey is the basis for much of *The Official Guide to American Attitudes*, which is an entertaining compilation of our opinions on everything from confidence in Congress to personal happiness. Since the GSS

has been conducted nearly every year since 1972, many of the tables contain data on how the same question has been answered in each of the past three decades. The book includes chapters on the environment, work and money, sex and morality and marriage and family.

*The Mid-Youth Market* uses various government and other information sources to paint a picture of the income, spending habits, family make-up, health, attitudes and other facets of the lives of 35-to-54-year-old baby boomers. □

*Who's Buying Food & Drink* (\$69.95, hardcover, 292 pages) by Marcia Mogelonsky, *Who's Buying for the Home* (\$69.95, hardcover, 502 pages) by Alison Stein Wellner, *The Official Guide to American Incomes* (\$89.95, hardcover, 364 pages) by Thomas G. Exter, *The Official Guide to Racial and Ethnic Diversity* (\$89.95, hardcover, 633 pages) by Cheryl Russell, *The Official Guide to American Attitudes* (\$89.95, hardcover, 425 pages) by Susan Mitchell and *The Mid-Youth Market* (\$69.95, hardcover, 276 pages) by Cheryl Russell are available from New Strategist Publications, P.O. Box 242, Ithaca, N.Y., 14851, or by calling 607-273-0913. The company's Web address is <http://www.newstrategist.com>. E-mail: [demographics@newstrategist.com](mailto:demographics@newstrategist.com).

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# Trade Talk

By Joseph Rydholm/QMRR editor

## Need statistics? These books have 'em

**T**he folks at New Strategist Publications have been busy. Since the beginning of summer it seems like a new book from the Ithaca, N.Y., firm has arrived at our offices every month. Here's a quick rundown on the latest batch, a half-dozen more contributions to New Strategist's already solid body of user-friendly compendiums of statistics.

Each of the six books is a collection of demographic and

economic data, largely from government sources, in a quick reference format, designed to give marketers of all stripes easy access to stats on a variety of consumer segments.

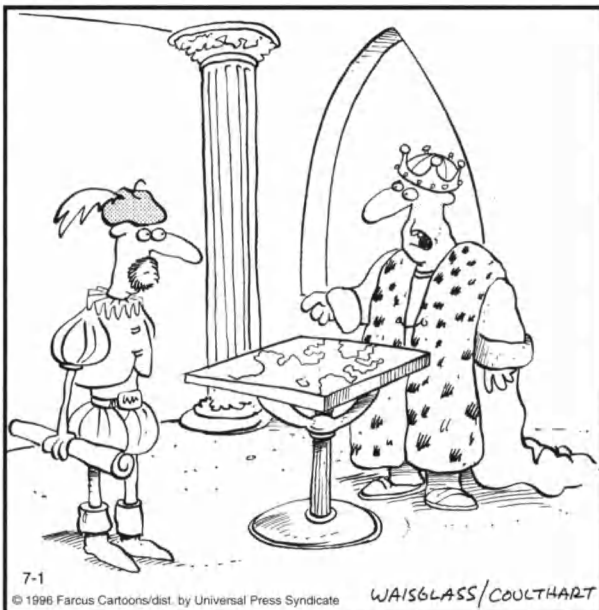
The information in *Who's Buying Food & Drink* and *Who's Buying for the Home* is based on data from the Bureau of Labor Statistics' Consumer Expenditure Survey. Both follow a similar approach, beginning with a spending overview (which is broken down by age and income, age and region, etc.) and devoting the next several chapters to spending by household type, region, education, age and so on. Each chapter contains a brief analysis and sections on average spending, indexed spending, average per capita spending, indexed per capita spending, total spending and market shares.

*Food & Drink* looks at expenditures for food and beverage purchases, broken down into basic categories (cereals, meats, dairy products, fruits and vegetables, alcoholic/non-alcoholic beverages, etc.) and subcategories. *Buying for the Home* contains figures on expenditures on utilities and rent/mortgage payments in addition to a variety of housing products from flooring to gutters.

*The Official Guide to American Incomes* uses data from the Census Bureau's 1995 and earlier Current Population Surveys as well as figures from the 1994 Consumer Expenditure Survey and the Federal Reserve Board's 1992 Survey of Consumer Finances. The book contains chapters on income trends, household income, personal income, discretionary income, household income projections, consumer spending, household wealth and net worth, poverty trends and geography of income and poverty.

### Farcus

by David Waisglass  
Gordon Coulthart



7-1

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WAISGLASS/COULTHART

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**"Sorry, Chris, our market research tells us that most people prefer it remain flat."**

continued on p. 73

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103. <b>Marketing Research for Decision Makers</b> New York ..... May 29-30	501. <b>Applications of Marketing Research</b> Cincinnati ..... Feb. 20-21 Houston ..... Apr. 10-11 Atlanta ..... June 12-13 Cincinnati ..... July 31-Aug. 1 New York ..... Sept. 18-19 Cincinnati ..... Dec. 11-12
104. <b>Questionnaire Construction Workshop</b> Boston ..... Jan. 20-22 Cincinnati ..... Feb. 24-26 Detroit ..... Mar. 24-26 New York ..... Apr. 14-16 Kansas City ..... May 12-14 Chicago ..... June 23-25 Cincinnati ..... Aug. 4-6 New Orleans ..... Sept. 29-Oct. 1 Minneapolis ..... Nov. 3-5 New York ..... Nov. 3-5 Dallas ..... Dec. 15-17	502. <b>Product Research</b> Cincinnati ..... Jan. 30-31 New York ..... Apr. 24-25 Chicago ..... July 15-16 Cincinnati ..... Oct. 14-15
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