QUIRK'S Marketing Research Review

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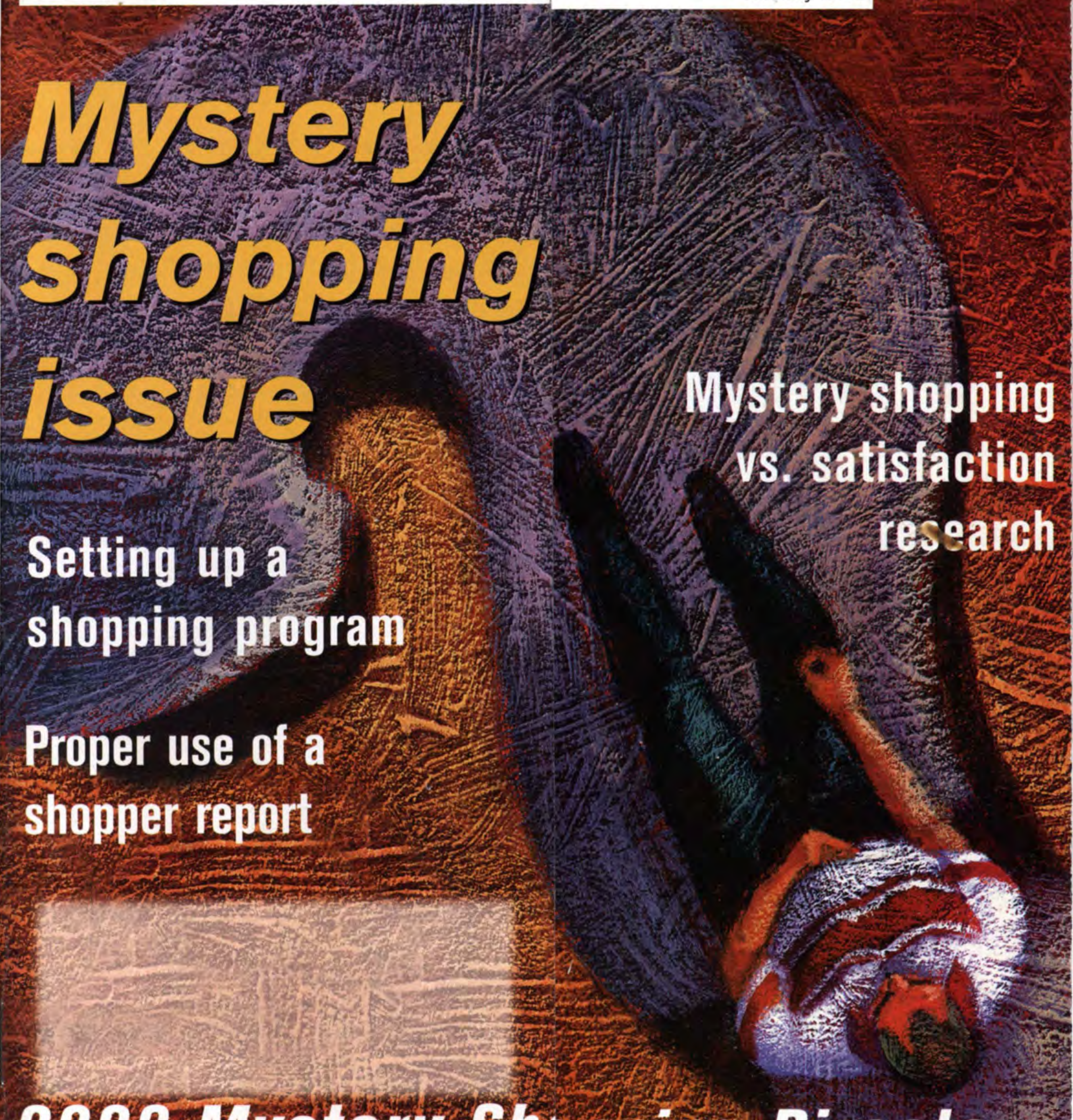
January 2000



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QUIRK'S Marketing Research Review

Volume XIV, Number 1 January 2000

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Consumers hail user-friendly packaging

Packaging research from The Consumer Network, a Philadelphia research firm, shows that consumer perceptions of food and beverage packaging have shifted dramatically. Instead of seeing packaging as a necessary evil, consumers see desirable packages as a reason to purchase, and packages they don't like as a reason to avoid products they might otherwise choose.

Triggering the shift is a critical mass of consumer-friendly packages that relieve widely experienced frustrations, delight the eye, or fit into busy lifestyles with new levels of convenience and flexibility.

Over 70 percent of the 1,600+ responses to The Consumer Network's packaging questions were able to cite specific packages that had significantly improved in the last year or so. Over 65 percent were able to cite packages that still needed improving and the kinds of improvements they hoped to see.

Twist-off closures on juice cartons were the most widely noted improvement, followed by personal-size milk bottles, the zipper-closures now on dozens of products, and no-spill (sports-cap) water bottles.

Fewer spills and easier opening are the most wanted packaging improvements. Consumers also applaud ergonomic packages shaped to fit the hand (so far mostly in cleaning and dishwashing products) and eye-pleasing graphics such as those on the Arizona Tea bottles, which have changed consumer ideas of the possible and desirable.

Many consumers think that all gable-top milk containers should have spouts or yield to alternative kinds of user-friendly and more convenient packages. They see soft drinks as failing to keep up with needs for smaller sizes, hand- and mouth-fit, reclosing, fizz retention, and sturdier bottoms. They like plastic but miss the cold-keeping attributes of glass.

A majority of respondents says that packaging improvements are needed in sugar and flour (80 percent), drugs in pill and tablet form (68 percent), crackers and cookies (61 percent), chips (58 percent), canned soft drinks (58 percent), cereal (57 percent), milk (55 percent) and two-liter soft drinks

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Latin America jumps on the Web

Jupiter Communications, a New York Internet commerce information firm, projects that more than nine million online users in Latin America logged on by the end of 1999, and the number will increase to 38 million in 2003 — this projected increase of nearly 50 percent annually marks it as the region with the highest expected growth rate internationally, exceeding that of the U.S., Europe, and Asia.

On-line Users in Millions (penetration/percent)

	1999	2003
Projected		
Brazil	5.8 (3.3%)	20.1 (11.1%)
Mexico	1.0 (1.0%)	4.8 (4.4%)
Argentina	0.7 (1.8%)	4.0 (10.3%)
Colombia	0.6 (1.4%)	2.5 (5.8%)
Chile	0.3 (1.9%)	1.4 (9.1%)
Venezuela	0.3 (1.4%)	1.4 (5.5%)
Peru	0.2 (0.7%)	1.0 (3.4%)
Other-Latin America	0.4 (0.4%)	2.5 (2.2%)
Total:	9.3 (1.8%)	37.6 (6.8%)

Jupiter's research on Latin America shows that the on-line population will continue to grow at a rapid rate, with the majority of the nine million on-line users within the region concentrated in Brazil, Mexico, and Argentina. However, penetration within the region will remain low, reaching a projected 6.8 percent of the population in 2003, highlighting the numerous challenges and opportunities that this market presents. For more information visit the company's Web site at www.jup.com.

Dave Rebstein has been named executive director of the *Marketing Science Institute*, Cambridge, Mass.

An executive team from Hackensack, N.J.-based research firm *Treistman & Stark Marketing, Inc.*, led by the firm's president **Joan Treistman**, has joined New York-based *Roper Starch Worldwide*. Treistman has been named a senior vice president of Roper Starch.

Mazda North American Operations, Irvine, Calif., has named **Kristen Simmons** group manager for brand strategy and communications. Her responsibilities will include advertising creative, media spending, relationship marketing and marketing research.

Media Metrix, a New York Internet and digital media measurement firm, has named **Lindsey Draves** vice president, client information.

Mark E. Berry has been named president of *NFO Interactive*, a Greenwich, Conn., research firm. He replaces **Charles B. Hamlin**, who has assumed the role of president and chief operating officer of the newly formed InsightExpress, an NFO affiliate focused on fully automated market research.

Needham, Mass.-based *Stratford Associates Marketing Research, Inc.*, has appointed **Marco Vriens** vice president and general manager of its San Francisco office.

Patti Sullivan and **Krista Browning** have been promoted to co-directors of the focus group facility and recruiting operations of *Opinions Unlimited, Inc.*, Houston.

Burke, Inc., Cincinnati has announced the following promotions: **Diane Salamon** to senior vice president; **Jamie Baker-Prewitt** to vice president and director of consulting and analytical services; **Mary Beth Mapstone** to vice president of finance. In addition, Burke Marketing Research, a division of Burke, Inc., has named **Tara Perigo Marotti** and **Jodi Lynn Steller** as account executives, client services.


Salamon


Baker-Prewitt


Mapstone

Peggy Gantz and **Naomi Owens** have joined *NETWORK*, a Covington, Ky., research firm, as marketing research project nanager. In addition, **Steve Goetz** has been named account director, **Beverley Reber** has been named marketing research project associate, and **Carolyn Marsh** has been named technical specialist.

Bill Schlegel, CEO of *MarketTools*, a Sausalito, Calif., research firm, has

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New Strategist books examine all aspects of U.S. consumer spending

Ithaca, N.Y.-based publisher New Strategist has released a number of new books on U.S. consumers and their spending habits. Based on unpublished data from the Bureau of Labor Statistics' 1997 Consumer Expenditure Survey (CES), *Best Customers: Demographics of Consumer Demand* examines spending patterns for individual products by the demographic characteristics of households. The book analyzes household spending on 300 products and services (from alcoholic beverages to air travel) by age of householder, household income, household type, and region of residence. It identifies which households spend the most on a product or service and which control the largest share of spending. *Household Spending: Who Spends How Much on What*, a companion to *Best Customers*, also uses CES data to give readers a complete statistical picture of the buying habits of U.S. consumers by age, income, household type, and region of residence. *American Incomes: Demographics of Who Has Money* explores the economic impact of the changing U.S. economy and its effects on household income, women's income, men's income, and discretionary income. *The Baby Boom: Americans Aged 35 to 54* provides marketers with the demographic and spending data needed to target Baby Boomers. Its nine chapters examine Boomers' attitudes, education, health, incomes, labor force participation, living arrangements, population, spending, and wealth. *Americans 55 & Older: A Changing Market* takes a similar approach to profiling older Americans. The two-volume set *Regional Markets: The Demographics of Growth & Decline* shows where the U.S. will be changing in the years ahead by age, race and Hispanic origin, household type, and income. Each chapter presents data for the nation as a whole as well as for individual regions, divisions, states, metro areas, and counties. *The American Marketplace: Demographics & Spending Patterns* is designed to give quick access to data from government sources to those who need the latest demographic and spending data but don't have the time to search for the numbers. For more information call 800-

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Research Industry News

The Council for Marketing and Opinion Research (CMOR) has introduced C.H.R.I.S. (CMOR's Hotline and Research Information System), a toll-free number (800-887-CMOR) for consumers who want to know more about the survey research industry. The IVR-based system is accessible 24 hours a day and can help callers learn the importance of their role in the research process, researchers' commitment to respondents, and how research and telemarketing are different. Callers can also learn how to reduce the number of telemarketing calls they receive. They can also leave a message for a CMOR staff person or contact CMOR via its Web site (www.cmor.org) for more information.

Fifty figures in European market research, drawn from suppliers and multinational buyers of research, are backing an initiative aimed at creating a coordinated global advocacy of the market research industry's case. Its first targets are to combat over-restrictive legislation and to make the case for research's effective contribution to profitable commerce and sensitive government. The agreement emerged from the first Research Industry Summit Europe (RISE), held in Amsterdam in November under the auspices of the **European Society for Opinion and Marketing Research** (ESOMAR) and the **European Federation of Associations of Market Research Organizations** (EFAMRO). The first practical step will be the immediate setting up of a dedicated e-forum, facilitating a continuing top-level dialogue,

Research Calendar

SPSS MR SEMINARS: SPSS MR is offering an ongoing seminar series at its New York offices on the second and fourth Wednesday of each month. Mornings will showcase designing and running Web surveys; afternoons will outline advanced tabulation and interactive analysis options. For more information call 212-447-5300 or visit www.spss.com/spssmr.

ATTITUDE RESEARCH CONFERENCE: The American Marketing Association will hold its Attitude/Behavioral Research Conference on January 23-26 at The Pointe Hilton Resort at Squaw Peak, Phoenix, Ariz. For more information visit the organization's Web site at www.ama.org.

CONFERENCE ON LATIN AMERICAN E-COM: The Jupiter Internet Commerce Forum: Latin America, will take place February 15-16 in Miami and offer the latest research from Jupiter Communications, a New York Internet commerce information firm, and speakers such as Starmedia CEO Fernando Espuelas, Jupiter's team of analysts, and senior marketing and business executives. For more information visit www.jup.com.

ARBITRON/TAPSCAN USERS CONFERENCE: The Arbitron/Tapscan Users Conference will be held February 16-18 at the San Francisco Hyatt at Fisherman's Wharf. Scheduled sessions include "Bridging Qualitative into TVSCAN" and "Power Planning and Estimating for Television." For more information visit www.arbitron.com.

CUSTOMER SATISFACTION CONFERENCE: The American Marketing Association will hold its Customer Satisfaction & Quality Measurement Conference at the Adam's Mark Hotel in San Antonio, Texas, on February 20-22. For more information visit the organization's Web site at www.ama.org.

QUALITATIVE RESEARCH ROUNDTABLE: The Institute for International Research (IIR), New York, is sponsoring Q Search: A Top Level Roundtable for Qualitative Researchers on February 28-29 at the Radisson Bahia Mar in Fort Lauderdale, Fla. The conference is dedicated to exploring observational, on-line and other non-traditional methods of qualitative research. For more information call 888-670-8200 or visit the IIR Web site at www.iir-ny.com.

ARF EXPO: The Advertising Research Foundation will hold its 46th Annual Convention and Research Infoplex 2000 on March 6-8 at the New York Hilton & Towers. For more information call 212-751-5656 or visit the organization's Web site at www.arfsite.org.

MARKET RESEARCH SOCIETY CONFERENCE: Britain's Market Research Society will hold its annual conference on March 15-17 at the Brighton Metropole, Brighton, England. For more information visit the organization's Web site at www.marketresearch.org.uk.

SAWTOOTH SOFTWARE CONFERENCE: The eighth Sawtooth Software Conference on Acquisition and Analysis of Market Research Data will be held March 21-24 at the Hyatt Regency in Hilton Head, S.C. Scheduled speakers will cover topics such as conjoint/choice analysis, Web-based interviewing and classification/segmentation algorithms. Speakers have been challenged to emphasize practical rather than theoretical topics. Prior to the general session, tutorials will be offered on market research over the Internet, Hierarchical Bayes, using SPSS and SAS software, and an introduction to CBC. For more information call Marilyn Stanford at 360-681-2300 or visit the company's Web site at www.sawtoothsoftware.com.

opened out to a wider spectrum of the industry. The focus is on joint development of an agenda for action. The initiative will be continued at this month's meeting of the U.S. industry Research Industry Leaders Forum. Observers from U.S. research organizations outlined their industry's concerns about restrictive data protection legislation limiting legitimate research activities and indicated their support for a global orientation. A second RISE is planned for early summer 2000, focusing on lining up the resources required to push ahead a global agenda and also on the implications of e-commerce, another attention area identified at the Amsterdam summit.

The American Society for Testing and Materials (ASTM) Committee E-18 on Sensory Evaluation has announced two new task group activities within Subcommittee E18.05 on Sensory Applications-General. The Accreditation Task Group plans to develop standardized qualifications for certification of laboratory facilities/operations staff and programs in the field of sensory analysis. To comment or participate, contact Delores Chambers of Kansas State University at 785-532-0162 or at delores@humec.ksu.edu. The Consumer Methods for Product Research Task Group is developing a manual to define qualitative and quantitative methods of sensory analysis. Questions or comments may be directed to Subcommittee Chair Mona Wolf of WolfSensory Inc. at 513-398-1500 or at wolfsens@eos.net.

Significant profit opportunities await consumer packaged goods (CPG) manufacturers if they focus on new product development, more efficient pricing and expanding distribution, said Joe Durrett, chairman and chief executive officer of **Information Resources, Inc.**, Chicago, in remarks to an audience of company executives and Wall Street analysts at Schroder & Company's Food, Beverage and Consumer Products Conference at New York's Millennium Hotel in November. Durrett cited seven recent consumer trends that have created significant growth opportunities for the CPG industry over the past five years, and whose influence will continue into the Year 2000. Specifically:

1. Convenience and portability — products such as bottled water, moist towelettes and lunch kits saw average sales increases of 98 percent since 1994.

2. Ready-to-eat consumption — over $4 billion of growth in categories such as frozen pizza and appetizers, refrigerated dinners and fresh salad kits in past five years.

3. Natural/organic foods — an ever-growing number of products bear nutritional claims, and natural/organic products will account for $9.4 billion in 1999.

4. Functional foods – high-protein meals, energy bars and herbal-enhanced products grew in excess of 75 percent since 1994.

5. Health and self-care — nine categories, including hair growth and hair coloring products, nutritional supplements, antacids and anti-smoking prod-

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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. He can be reached at 818-782-4252 or at artshulman@aol.com.

Gail Fleenor tells about recently conducting an in-store customer survey using personnel from a temporary agency. The first temp to arrive for training walked past the door of the room several times before entering. When he worked up his nerve to enter the room, he took his seat without looking right or left. Fleenor asked his name and attempted to engage this terribly shy person in a little conversation to make him feel more at ease. However, he remained uncomfortable.

His shyness was painful to watch throughout training and during the practice session he was asked by each participant to repeat his answers because of his extreme soft-spokenness. In fact he barely moved his lips when speaking! Fleenor was sure the young man would be afraid to approach customers for interviews but, since she was short on personnel, she decided to give it a try.

The shy young man actually did an adequate job interviewing customers. He did not hesitate to approach them but made no small talk and did not smile. His only comment about the survey: "All the people I've interviewed seem to have hearing problems."

Fleenor also tells about conducting in-store surveys in two small towns and receiving two types of refusals she'd never received before. One man refused to be interviewed because he was purchasing beer and was sure that somehow through the survey (which of course was anonymous) his pastor would find out that he drank.

Another gentleman purchasing beer refused to be interviewed because he didn't want his wife to know he was buying beer again.

When Terry Thompson of Thompson Information Services was with a major research supplier, he conducted an annual awareness and satisfaction tracking study among cotton growers for a major ag-chem company. After his annual client presentation, the client routinely compared survey results, by region, with actual sales changes, and occasionally asked Thompson to discuss discrepancies.

Most years, comparisons were close to survey expectations. But once, one region showed big sale increases while the survey data would have predicted a sales decline. When challenged, Thompson had no clue. Fortunately, the regional sales manager was in attendance at the presentation. He explained that marijuana growers in the area had learned that the client's product worked as well on marijuana as on cotton. And since Thompson only surveyed the targeted cotton growers, his survey missed the marijuana growers responsible for much of the regional market growth.

Cher Hoffman of The Horace Mann Companies tells about conducting a focus group of existing customers. A new mother arrived with her four-week-old infant. The subject matter to be covered did not involve baby products. The group was intentionally recruited to be quite small, only six respondents, and Hoffman didn't want to offend a customer. So, she decided to see how things would go with the infant.

Shortly after the group began, the baby started to cry. The mother immediately began breast feeding. That was distracting, but only for a moment. The other respondents were quick to get back into the subject matter.

But, then the mother decided she wanted more food from the refreshment table. She then handed the child to the respondent sitting next to her. When the baby began to cry again, and the respondent holding the baby obviously wasn't prepared to continue with the breast feeding, Hoffman said to the mother, "You know, your baby isn't very happy here, and she is far more important than this group, so why don't you go ahead and take her home. Here's your $50 for your time."

But the woman refused to leave. She said she was enjoying the group and the food too much to leave. So, she took the child from the other respondent and continued to feed the child. The child quieted and the group resumed. When the group ended, the mother returned to the food table for more food — several times, in fact.

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.

DESIGN INSPIRATION

In-home research gives Mirro the ingredients for its Allegro cookware line

By Joseph Rydholm, QMRR editor

Long a fixture in the cookware sections of discount stores with its Wearever line, Mirro Company wanted a unique, new product that would give it an entrée into specialty and department stores. The Manitowoc, Wis.-based firm got just what it wanted with the debut of its Allegro cookware, thanks to a pinch of innovation, a dash of design ingenuity, and a heaping portion of marketing research.

The plan was to begin marketing Allegro via infomercial and then expand to retail outlets later. But for now, the infomercial approach, which began in late 1998 and has been wildly successful, will do.

What's all the fuss about? Allegro cookware is round on the bottom and expands to a square at the top, which not only makes it easier to handle and store but also lets it hold more food than a round pan of similar height. The pots and pans have a non-stick surface, developed exclusively for Mirro by DuPont, that withstands contact with the dreaded metal utensils. The lids have two side-mounted handles for easy pouring and transportation and a vent that allows boiled-over liquid to drain safely

back into the cooking vessel. The vent also eliminates the need to remove potentially hot lids during cooking. Plus, the pots and pans stack with lids in place or can be easily nested without them.

The inspiration to combine all of these features came from in-home research, during which observers watched consumers struggle with every aspect of the task of cooking, from storing the pots and pans to pouring with and cleaning them. It was a series of needs crying out to be met.

Clean sheet of paper

After Mirro decided to create a product for the department and specialty store market, it turned to Metaphase Design Group, St. Louis, for help with the design work and the marketing research. "Mirro asked us to start with a clean sheet of paper," says Kent Ritzel, director of Metaphase. "They said, 'Forget everything you know about cookware, and let's see where it takes us.'"

Metaphase began by examining consumer product safety information to find out more about cookware-related injuries and general kitchen

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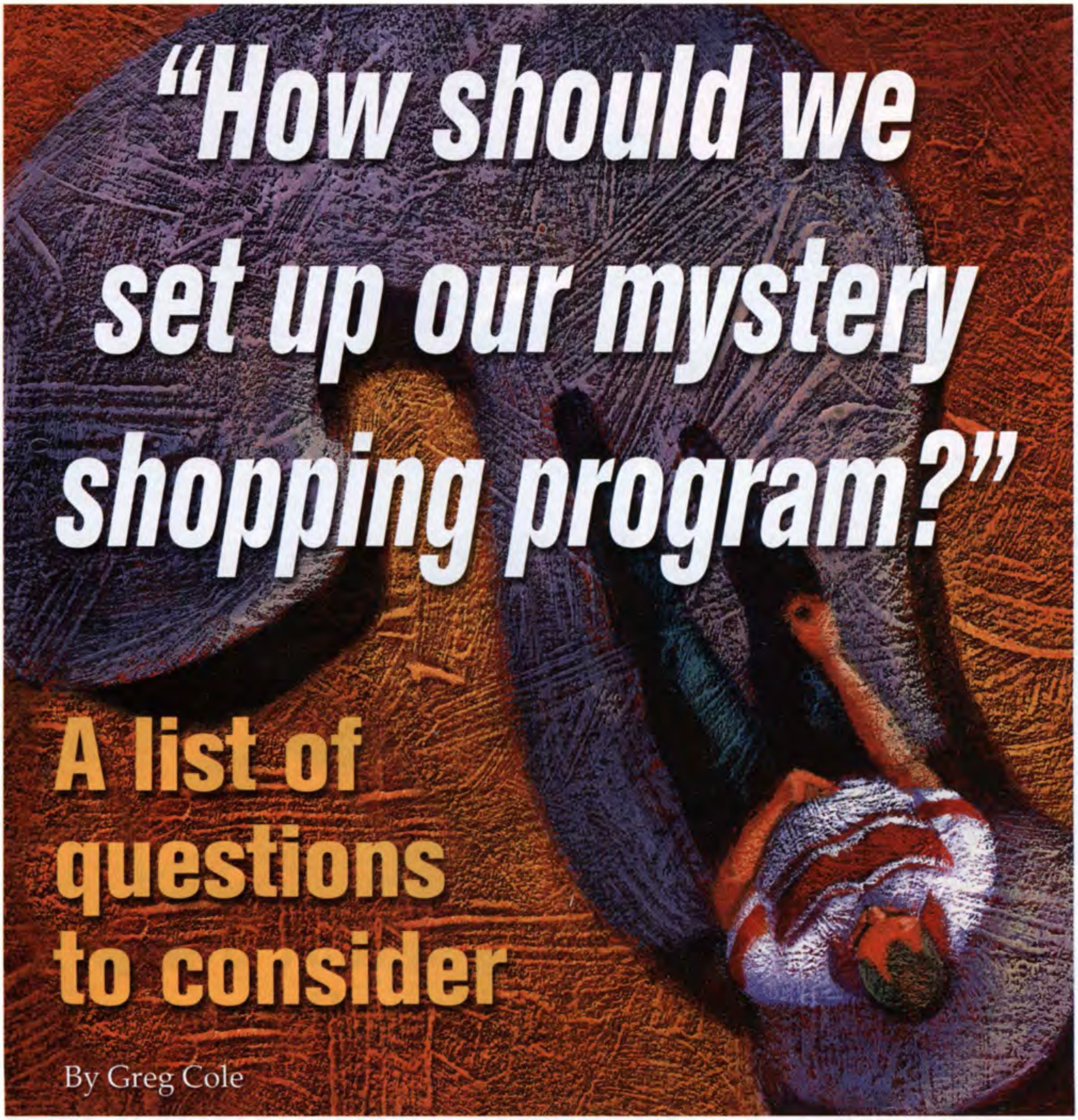


"How should we set up our mystery shopping program?"

A list of questions to consider

By Greg Cole

Editor's note: Greg Cole is sales manager for Pinkerton Field Research Services, an Atlanta mystery shopping firm. He can be reached at 800-390-2415, ext.132 or at gregc@pktnshop.com.

For most companies considering the initial implementation of a mystery shopping program, confusion rules. There is frequently no one involved in the process who has much experience designing or using a program and therefore there is little idea of how to begin. Different departments within your organization pull in different directions with their own needs and requests, and you end up falling back on the mystery shopping provider for guidance, slowing things as questions and recommendations go back and forth.

Luckily, the situation needn't be this confusing. Below is an outline of some of the information mystery shopping provider companies typically need to know as they begin putting a program together. These questions are not all-encompassing but by having considered the general areas outlined, you will come to the planning process already armed with some basic ideas about how you want your program to work.

Why do it?

• Why do we want a program?

• What do we want to know about our operations?

• What does senior management expect to get out of the program? What does operations expect from it? Which other departments of the company will be affected and how will they be included in both the planning and reporting of the information?

Design

• What will we use to establish the standards and practices on which to base the evaluation format? Do we have an operations manual or another set of guidelines that could be utilized in the design process?

• Will we design our own form or use a generic format provided by the shopping company?

• What areas will we emphasize or give the most weight to while designing the evaluation format? Quality, service, facility condition/cleanliness or some other?

• What complaints or suggestions are we hearing from our customers and how can we address them in our evaluation design?

• Who from within our organization will have input on the design format?

• What kind of evaluation format will we use? Will it be scored? Have a narrative? How lengthy/detailed?

• How often will we shop each location?

• How many locations will we shop — every location or a sampling?

• Will the evaluation involve the purchase of a product or service or otherwise require the shopper to spend money? Will we need to provide this payment up front?

• How long should each shopping experience take? Will the shopper be required to return a product or otherwise make multiple visits to a location?

• What kind of objective measures can we use to reduce the subjectivity of the process and thus build better credibility with field operations? (Thermometers, stop-watches, scales, pictorial quality guides, product samples, instruction manuals for shoppers, etc.)

Administration

• Who will be in charge of the program internally — operations, marketing, quality assurance, some other department? Will we dedicate one employee to act as the liaison between the shopping service and the field operations?

• What type of appeal process will be established? Who will administer this process? Someone in our company or someone from the shopping service?

What areas will we emphasize or give the most weight to while designing the evaluation format? Quality, service, facility condition/cleanliness or some other?

• Will the program be linked to any motivational program? Manager's bonus? Employee non-monetary reward system? On-the-spot cash reward? Line employee cash bonus?

• In what form do we want to see the results reported? Will we receive a copy of the original form or only a summary? Aggregate numbers only? Who will receive the results? Only headquarters, area managers, or will they be sent directly to field operations units?

• Will the shoppers need to have a specific profile to match our customer base?

• What kind of shopper rotation will be required? Will recognition of the shoppers by operations personnel be likely? How will we handle recognition if it occurs?

• Do operations locations have obvious limiting factors which could affect the timeliness of shopping visits (restricted business hours, limited access, etc.)?

How to use it

• How do we expect to use the information gathered?

• How else could the program be used: as a marketing tool, in advertising, etc.?

• What other systems (motivation, incentive, corrective processes, etc.) will be needed to make the program work most effectively?

• What kind of corrective process will we set up to deal with problems exposed by the evaluation process?

• How will we communicate successes and failures of the program to the field? A regular newsletter? How will we recognize top performers?

• How will we know if the program is a success? How will we measure the results?

Thinking through the areas shown above will allow you to better assist your provider during the initial design stage and insure a smoother and more timely planning and implementation process. You will more quickly begin gathering the information needed to help you be operationally efficient and responsive to your customers and therefore more profitable. [Q]

Proper use of a mystery shopper report

By Michael Bare

Editor's note: Michael Bare is president of Bare Associates International, Inc., a Fairfax, Va., research firm. He can be reached at 800-296-6699 ext. 3131.

Many service firms, at some point in time, have engaged the services of a mystery shopper or guest services evaluator. This shopper's job is to discreetly observe the firm's operations and objectively report observations to management. Obviously, in observing how a company operates, the evaluator is assessing the actions of its employees, from the quality of their service to the integrity of their financial transactions. Therefore, the evaluator's observations have significant personnel implications and are powerful as both a complimentary and disciplinary tool.

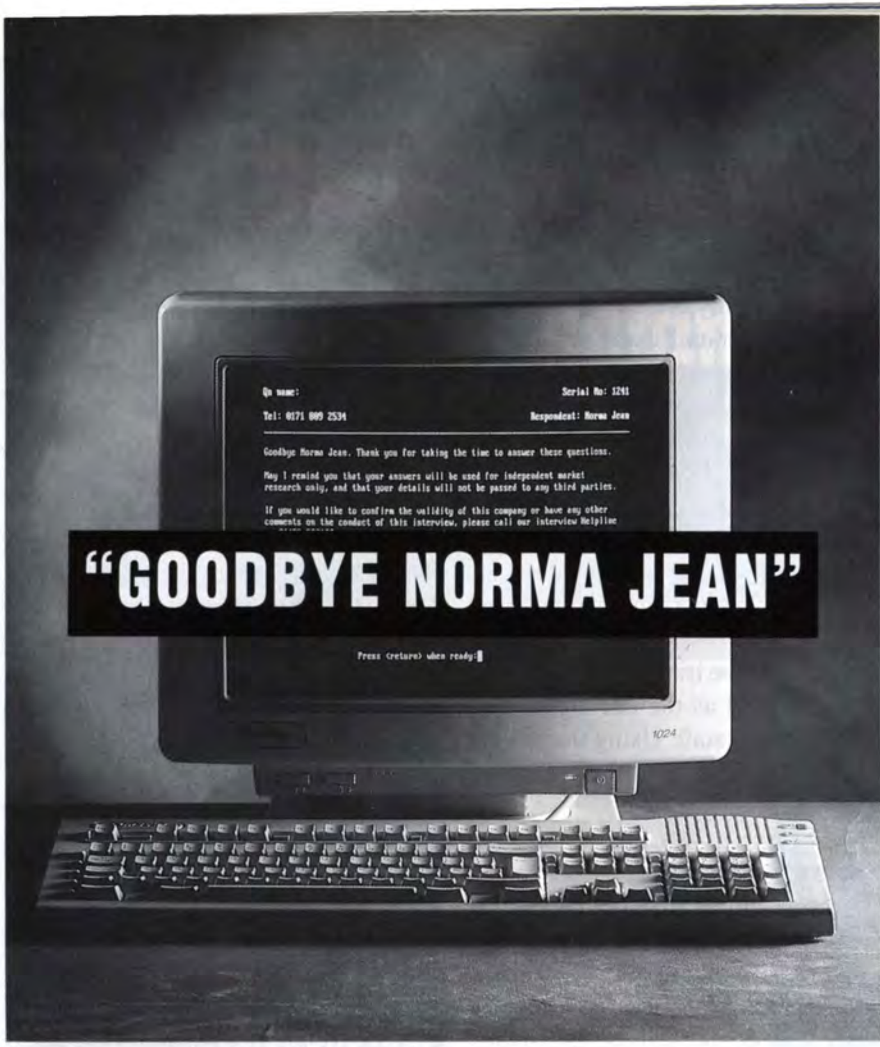
For this article, we will focus on using mystery shopping to examine the service at a hotel. When shopping a hotel, an evaluator's survey can take a variety of forms, ranging from a multi-day observation of all guest services, to an audit, to a brief survey of a particular hotel department.

The evaluator typically poses as a guest, uses hotel facilities and takes note (literally and figuratively) of the positive and negative aspects of the operation. In a full survey, the evaluator will use all of the services available — beginning with making a reservation and continuing through to the checking out of the property. He or she will note employee behavior, speed, attitude and accuracy, and will report the transactions carried out by employees (particularly monetary transactions) enabling management to insure compliance with proper procedures.

Notes are sometimes written, though usually dictated. Prompt documentation is of major importance to insure accuracy. Upon check-out, the evaluator (or shopper) will often provide a verbal executive debriefing with senior management, in order to report key issues (issues, possible irregularities and opportunities) and then follow-up with a full written report of all observations.

Reports should include, but not be limited to, observations of:

a) satisfactory or exceptional employee performance;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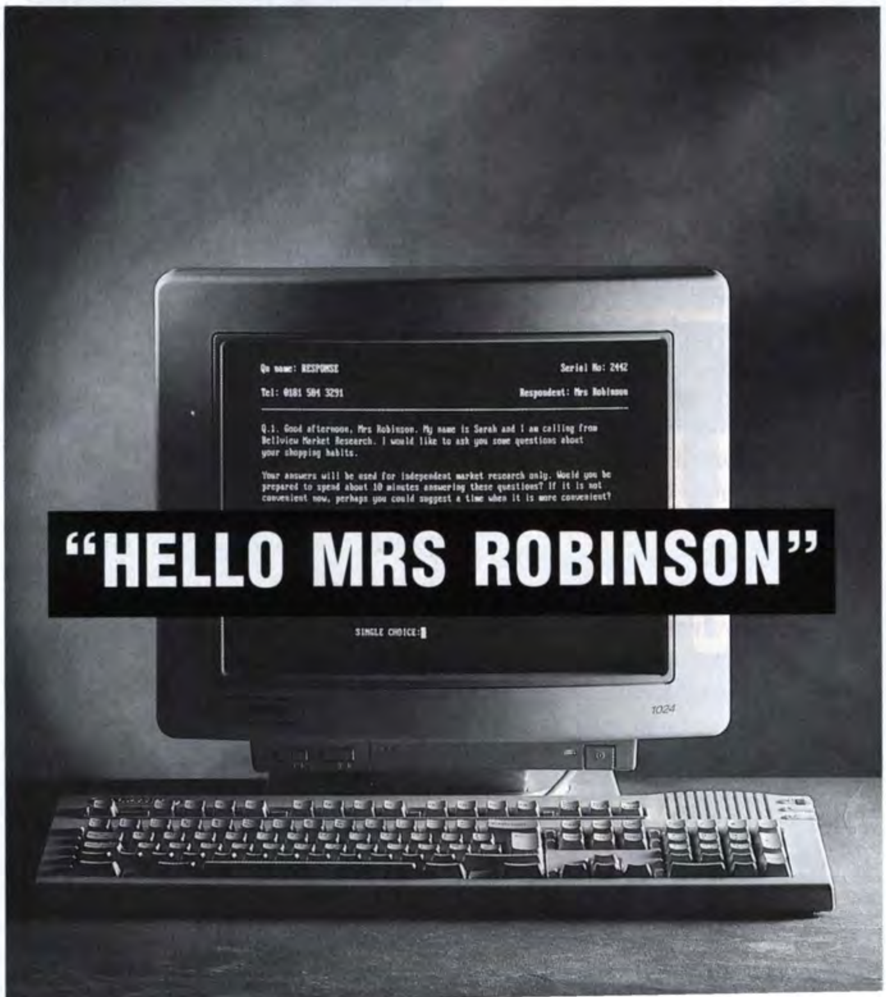
"HELLO MRS ROBINSON"

b) integrity issues;

c) training opportunities;

d) housekeeping;

e) revenue-building opportunities (i.e., room service salesmanship);

f) facility maintenance, to include possible liability issues.

Prudent operators use these reports as a tool to work with and develop management and staff, and prevent/correct problems. Once the evaluation has been performed, the key is to utilize the information provided in a most meaningful way. For the balance of this article, we will focus only on personnel ramifications.

There may be issues if the shopper report is used as the only basis for disciplining a staff. Using the report as a springboard for further research is preferable.

Adhere to procedure

It is essential that management adhere to procedure when disciplinary action is required. For example, if the evaluator reported that his room was not properly cleaned, the executive housekeeper could begin periodic spot checks and use his/her own observations as the basis for corrective action against any implicated employees. Or, if the evaluator reported inconsistent cash handling procedures in the bar, management could deal with the problem by reissuing policies and procedures and re-instructing its employees on proper cash handling. Establish the perception of control with your staff.

Management research, by using in-house personnel, can often assure everyone involved of the thoroughness and accuracy of details provided. Consider though, that an in-house test may not garner the same perspective of hotel services as that of an anonymous evaluator.

Often, management's gut reaction is to view the shopper's report as the gospel (i.e., sufficient evidence for disciplinary action). If you're using a reputable, established shopper firm, accuracy of the report should seldom be an issue, but I recommend your scrutinize the facts closely.

Call the mystery shopping company and ask to speak with the shopper. Solidify your comfort level with the shopper's credibility and the details provided in their report. Detailed narratives are significantly more credible than an audit checklist or a yes/no format with limited comments.

If the report is to be used as a basis for disciplinary action, that action may be challenged (i.e., lead to union grievances) and the evaluator must be ready to testify. Before deciding to use the evaluator report as the sole documentation for employee discipline consider that an arbitrator may not take an evaluator's report at face value.

Prudent operators use these reports as a tool to work with and develop management and staff, and prevent/correct problems. Once the evaluation has been performed, the key is to utilize the information provided in a most meaningful way.

Insure you have acted promptly in investigating the facts and deciding

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upon potential disciplinary action. The shorter the time lapse between the incident and your action, the better, as time can undermine the report's usefulness. Some union contracts require discipline take place within 48 hours of your receipt of the report.

Talk with the employee in question to get their side of the story. Employees in California must be given relevant portions of the report prior to discipline being imposed. Management is also required to fully investigate the employee's explanation. Find and interview witnesses. Remember: innocent until proven guilty.

Thoroughly review and save all evidence, especially with reports that involve possible financial improprieties. All original checks, credit card vouchers and register tapes must be reviewed to see if there is any explanation other than employee misconduct for discrepancies. Check for patterns of "overages" or even drawers that always balance to the penny. Check and double-check.

Make an honest assessment if the rule or procedure violated has been adequately published and enforced. Actions that seem to violate house procedures may be overturned if there has not been consistent enforcement.

In summary:

a) Ensure your operational policies are clearly written and reviewed with some frequency. Most are out of sight, and out of mind.

b) Use of a credible mystery shopper firm pays dividends.

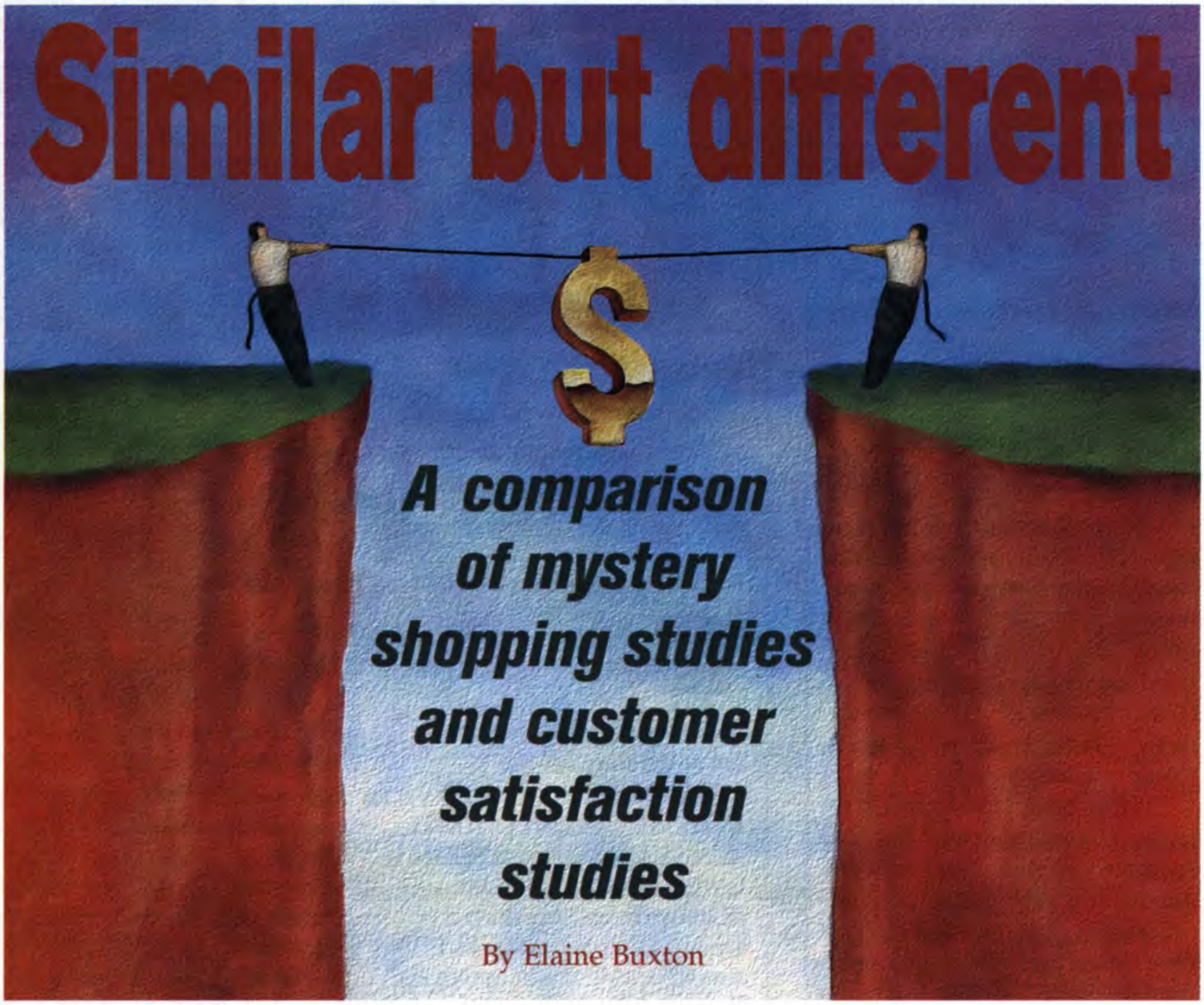
c) Use the reports to reinforce positive behavior and establish a perception of control with your staff.

d) Commit to diligence and speed in researching the details of a report.

e) Think before you react. Be consistent in your actions.

f) Consider the ramifications of disciplinary action, but do take action as the need requires.

g) When in doubt, get the human resources or legal departments involved.



Similar but different

A comparison of mystery shopping studies and customer satisfaction studies

By Elaine Buxton

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Every company wants to measure customer satisfaction. It is the heart of any modern business strategy. Experts estimate that most North American companies spend about 3 percent of revenues on customer satisfaction measurement. Understanding customer demographics, expectations, motivations, and desires creates an opportunity to serve customers better than competitors do. Serving customers better creates satisfied customers, builds repeat business, and drives profitability. Customer-driven companies eagerly spend that 3 percent of revenues to learn more about how they are doing with customers. Are they getting the information they ultimately need?

Customer-driven companies want customer satisfaction information on which to base long-term strategies. They also want information to help them serve customers better right now. Can one set of data serve both short-term and long-term needs? Is a customer satisfaction study a substitute for a mystery shopping study? Can mystery shopping studies be used to gauge customer satisfaction? To answer these questions, one must understand the overlaps and differences between customer satisfaction studies and customer service measurement studies, such as mystery shopping.

A customer who visited a restaurant a week ago cannot tell you with accuracy about the specific attributes of his recent visit. He probably does not remember whether he was greeted, seated, and served within a reasonable time, received piping hot food, visited a clean rest room, was served with a friendly attitude, given a check promptly, etc. All of those attributes of the visit, along with many others, combined to create a level of satisfaction in his mind. That overall satisfaction is important to the strategy of the company and will ultimately affect long term decisions. But does it help the restaurant serve customers better right now? The answer

is usually no.

Revealing the "why"

Customer satisfaction studies reveal how customers feel about customer service. They do not reveal why. Customer service measurement reveals the "why" that stimulates continuous improvement. Essentially, satisfaction studies report perceptions and service studies report performance. If a satisfaction study revealed that customers thought food service was slow in a chain of restaurants, valuable information has been gleaned. Acting on this information alone would be impractical. Would the chain simply ask employees to work faster? Would it risk serving undercooked food for the sake of quick service? Would it redesign its units to receive food orders more quickly? Of course not. The chain would drill down deeper into the data to determine the root cause, the why. The chain would measure its speed of customer service, likely using mystery shoppers to take those measurements. If a subsequent mystery shopper study revealed that table-service customers were waiting an average of 10 minutes to receive their checks, a specific reason for customers to perceive slow service has been isolated. Causes for the delay can now be investigated. Causes might include slow credit card authorizations, understaffing, a backlog waiting for a manager approval, or lack of staff training to use computers. That one statistic — the more than 10-minute wait — gives managers a specific issue to work toward correcting. It gives the customer-driven company a way to serve customers better in the short term.

Think of customer satisfaction as the end product of a production line. In a retail environment, one stage of the process might involve approaching customers as they enter the store. Another stage might involve having advertised merchandise readily available, supported by prominent displays. All along the production line, customers decide how the business meets their expectations. Customer satisfaction surveys address the end product of the production line, revealing expectations and perceptions in total. By contrast, customer service measurements reveal performance at each identified stage of the production process.

Taking measurements along a production line and comparing them to established benchmarks should sound familiar. It is a basic principle of total quality management (TQM) called statistical process control (SPC). SPC requires that quality be inspected at every stage of the process, not just at the end. TQM proponents equate statistical process control of a production line to mystery shopping of service businesses.

In a retail service business, mystery shopping is likely the primary means of measuring customer service delivery along the "production line." That is because the most important stages of the production process are marked by difficult-to-measure interactions between customers and employees. Management cannot possibly witness every exchange between customer and employee. Yet so much of a customer's ultimate satisfaction with the company centers on individual interactions. Mystery shopper studies detail specifics of those interactions, highlighting areas of success and areas needing improvement. When employee performance is critical to customer service delivery, mystery shopper studies provide a consistent performance measure of the human aspect of the service process.

Because the shopper study measures specific performance, it offers opportunities to encourage desired behaviors (incentives) and discourage undesirable behaviors (training). Mystery shopping studies deal with specific performance criteria expected for each customer's visit. Properly designed, a company's shopper survey provides a clear blueprint for all stages in the process of serving customers. The shopper survey becomes the measure for the benchmark. Resulting data report customer service performance, as judged by the criteria set forth on the shopper survey.

Not the same

Because the shopper study involves use of a survey, it is easy to mistake it for a customer satisfaction survey. It is not. The shopper survey measures the extent to which the organization is performing to its own stated customer service standards. Inklings about customer satisfaction that emerge from shopper data are a secondary benefit, but not the primary purpose of the study. A mystery shopper's suggestion might lead to further investigation of a future product offering. A mystery shopper's comment might allude to a competitor's more-favored practices. However, comments and responses from shoppers must be considered within the context of the survey.

Care must be taken to recognize the survey bias inherent in a shopper survey. When shoppers are dispatched to visit field locations, they are given the shopper survey beforehand so they will know the criteria for performance measurement. Armed with these criteria, shoppers visit the units with a specific set of expectations. Obviously, units that perform poorly do not meet the survey expectations. Since the shoppers' expectations were trained on the survey, shoppers who report poor experiences tend to also report dissatisfaction (survey bias). It's human nature. Answering a survey negatively makes one more likely to perceive an experience as negative.

For example, customer satisfaction studies might indicate that restaurant customers who order appetizers perceive shorter wait times for meals. Appetizers also add incremental revenue, so offering them becomes one of the company's best practices. Offering an appetizer becomes a standard question on the shopper survey. Shoppers who visit the units and are not offered appetizers might report disappointment in not being offered an appetizer. Would an average customer report dissatisfaction about not being offered an appetizer? It's unlikely.

Customer satisfaction studies face a different bias that is created by assumptions about customer expectations. Customer expectations come from many sources, primarily demographic, psychographic and economic. These sources collide and congeal to form an individual customer's expectations. Many individuals must be interviewed in order to reach a reasonable conclusion about overall expectations among the target customer population. Too often, satisfaction studies assume customer expectations instead of asking for them. In an attempt to quantify results, it becomes too easy to ask customers "Do you like it when a server offers you an appetizer?" when the real question has to do with perceived wait times, not with offering appetizers.

Listen for what's missing

The goal of a satisfaction study must be to listen for what is missing, what lies ahead, what can be done to keep customers in the future. This is easy to say and difficult to do. Customers are busy people; the most highly sought-after demographic groups are busier than most. Many customers are reluctant to respond to surveys. Fewer and fewer are willing to answer yet another survey phone call, mailed questionnaire or comment card. Those who are delighted to answer the survey may not be representative of the target customer population. To secure a reasonable customer response rate, companies are often tempted to shorten the customer satisfaction survey to just a few questions so that a reasonable response rate will be received. Unfortunately, this least-common-denominator process leads to mediocre results with little actionable data. Modern customer satisfaction studies seek direction from customers, not a scorecard. Satisfaction studies that only affirm the past rather than seek the future waste time and money. Too often they are intentionally designed to affirm current management strategies rather than unearth opportunities to better serve customers.

If mystery shopping studies give shoppers a yardstick with instructions to measure in inches, satisfaction studies ask what unit of measure should be used in the first place. Shopper studies measure the process of delivering customer service (performance) while satisfaction studies measure the outcome of customer service performance (perceptions and expectations). Both measures are important to the overall health of a customer-driven organization. Both are part of an ever-repeating process of continuous improvement. In the end, there can be no customer satisfaction without customer service.

	Customer *Satisfaction* Study	**Customer *Service* Study: Mystery Shop**
Scope of Data	Broad—Organizational	Specific—Unit Level
Organizational Perspective	Strategic	Tactical
Reports on:	Perceptions (feelings)	Performance (facts)
Data appropriate for:	Planning, Strategy	Action
Appropriate Stage of Service Delivery	Outcome	Process

How important is your international research project?

By James M. Velayas

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Upon reading the article "Q&A: Conducting research in Egypt and Israel" in the November 1999 issue of *Quirk's* I was astonished to find a similar belief uttered by the two interviewees. The research principals in both Egypt and Israel said essentially that there is no reason for U.S. based clients to be present during the research unless they wanted to, "enjoy a nice holiday." This is wrong.

Over the years I have been responsible for research projects in Europe, South America and the Far East while others in my group have covered the world — including both Egypt and Israel. The quickest way to end up spending tens of thousands of dollars for meaningless results is to follow the advice suggested above. I believe that any responsible researcher, manager or client who fails to become personally involved in the research process puts both his firm and career at great risk.

Each phase of the research process — from defining the target population to determining sampling requirements, from selecting interviewing methodology to developing and translating the questionnaire — requires the involvement and active presence of the responsible party. And that responsible party is you.

Regarding the language barrier, I am reminded of a friend who, after taking four years of French in high school and another four years in college, took his first trip to France. At the airport he caught the train for downtown Paris and, shortly after leaving the station, the train stopped in a dark tunnel. For three hours he sat on the stalled train and, as they waited, every 10 minutes the train's conductor would make an announcement. Even after eight years of French and hearing the same announcement over and over again he never did fully understand what the problem was.

So now imagine that you are going to do research in a foreign country with a project that has a budget of $100,000. In all probability, you do not speak the language of the country where the research is to be conducted. Now suppose you have found three research firms that have good references or perhaps just good advertisements. First you will need to select the most appropriate research service supplier to execute your program. At the initial review meetings with the vendors all will have their top management people (their top salespeople) present, but you find that one firm you prefer. The reason for your selection will be that you find them to be very knowledgeable and their bid is competitive.

There is no substitute to being at "ground zero" when your research instrument is being translated and tested.

Questions and instructions that are given little thought in your U.S.-based studies become critical when moved into the international realm.

When people tell me they find a vendor to be very knowledgeable, that usually translates to mean they can communicate with the vendor. I recall my college definition of communication being, "the mutual understanding of ideas when conveyed." People are willing to pay a premium to work with a firm where the communication levels are high. And when you realize that you are willing to pay this premium you are tacitly affirming the inherent dangers of international research.

When was the last time you did not review the questions to be asked when you were doing a study in the U.S.?

What happens next? The vendor you have selected does not have its top management actually do the research since they are busy selling the firm's capabilities. Now you are handed off to the research manager, who may have been present at the first meeting, but was mostly silent and supporting the sales team. Your research manager in most cases does not possess the same set of language skills as the sales team, but this is who you are going to have to work with.

My advice here is to test your research manager. Have the manager get a paper copy of a research project they have recently completed. Ask them to translate one page of the document from their native language to English. This should scare you. Just think: They are going to take your English research instrument, both the questions and instructions, and translate it to their mother tongue. It is not my aim to belittle the foreign research manager, rather it is imperative to understand the hazards associated with the translation phase.

Then your research instrument is

going into the field where, if you are lucky, the field workers will able to execute the research as instructed. More often than not you will have a small army of interviewers spread across the country doing door-to-door interviewing since telephone penetration is never close to the 98 percent U.S. level. As the responsible party you have a duty to go into the field and verify that the instrument is performing as designed.

I remember being in Brazil sitting with an interviewer as she conducted an interview in Portuguese. While I do not know Portuguese I could tell something was amiss because what should have been a 15-minute interview was taking 30 minutes. Without going into details the translator had, as nearly as was possible, translated my English questions as precisely as possible without allowing for geographical variations. This resulted in the respondent being unable to answer many of the questions unless prodded by the interviewer.

There is no substitute to being at "ground zero" when your research instrument is being translated and tested. Questions and instructions that are given little thought in your U.S.-based studies become critical when moved into the international realm. When was the last time you did not review the questions to be asked when you were doing a study in the U.S.? Your involvement in the international study is of even greater importance.

While I could mention many more concerns and perils when it comes to doing international research I would like to close by saying a little something about this "nice holiday" attitude. International research is a grind. Granted, from time to time you will have a pleasant moment viewing sights most others only dream about, but usually you will be in for a tough haul. From the 10-hour airplane flights to days of jet lag to working through language differences to hotels with no air conditioning or over-aggressive heating systems to trying to figure out what you are eating, the "holiday" aspect will be minimal.

The norm will be frustratingly long days and nights as you fight to insure the research program you are putting in place will yield meaningful results. Days turning to weeks as you are away from family, friends and familiar surroundings will harden your attitudes towards those who fail to understand the demands of international research. However, in the end, knowing the contribution your diligence has made to the success of your firm will supply you with the satisfaction of knowing you did the right thing.

In closing, ask yourself this question: If you were going to do the same project in the U.S., how involved would you be in the research program? Whatever your answer is to this question it should be, at a minimum, the answer to the same question when it comes to conducting international research projects.

Hearing the customer's voice

Customer-driven concept and product development

By Camille Nicita and Christi Walters

Editor's note: Camille Nicita is director of qualitative research and Christi Walters is marketing research director at Gongos & Associates, Inc., a Bloomfield Hills, Mich., research firm. They can be reached at 248-205-9500.

Understanding the customer's voice dramatically affects the eventual success or failure of new products. When corporations embrace a more customer-focused product development philosophy they not only create satisfying products, but also understand how to position those products to create differentiation. This translates into success in the marketplace.

However, considering the number of failed products and services on an annual basis, the question arises: How well do corporations really know their customers? And further,

— What is the customer's connection with the product?

— What is really important to the customer?

— What does the customer really want and need?

— How are customers motivated to purchase?

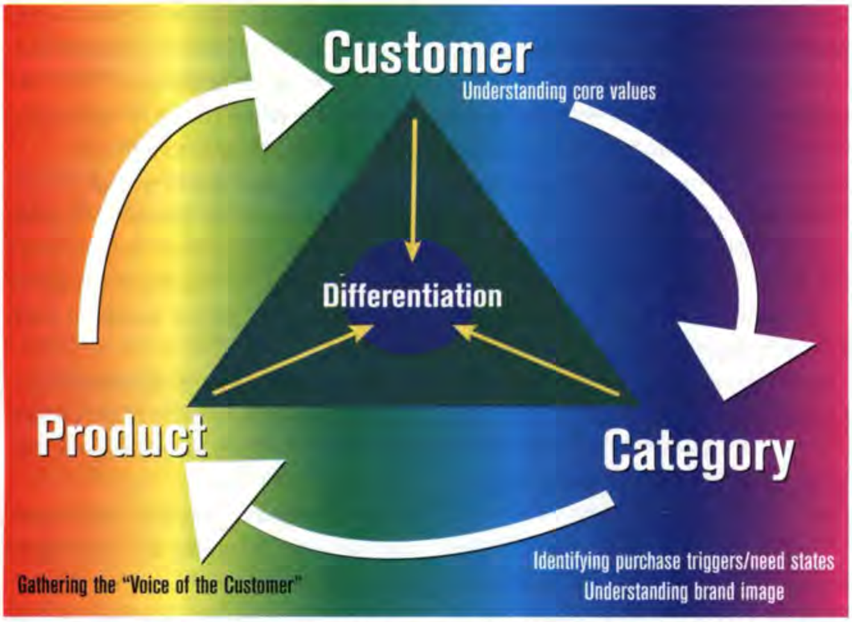
— How do customers talk about the product?

— Is the customer's voice differentiated from the internal voice?

To help corporations further understand their customers, marketing research methods must be employed to ensure customer-driven concept and product development. The model shown on the facing page helps illustrate how this theory works.

To achieve differentiation in the marketplace, the complete picture (including all three components) must be captured. The key is to understand the customer (their wants, needs, motivations, emotions and values) and evaluate the marketplace (looking for gaps, opportunities and unmet wants and needs) before embarking on the development of a new product concept or product extension.

An example: Past automotive history suggests that excess plant capacity typically dictated whether a new vehicle would be manufactured regardless of what the customer wanted or what the market could support.



Today, many automotive corporations have improved their customer focus and look at a more complete picture. For example, the dramatic increase in sport utility vehicle (SUV) sales has been customer/market-driven. When questioned, consumers articulated their specific wants and needs for a utilitarian vehicle. Consumer comments suggested that there was room for many types of utility vehicles based on diverse usage, styling desires, core values and unfulfilled gaps/opportunities in the marketplace. Hence, the sport utility market landscape is filled with many and diverse vehicles to suit a wide range of customer needs.

The purpose of this article is to introduce several qualitative techniques for gaining a comprehensive, customer-driven focus for product and concept development. (While our emphasis is on qualitative techniques, please note qualitative research should be used in the investigative stage and further quantitative validation is also recommended.) The following four areas will be explained:

- gathering the "voice of the customer";
- identifying purchase triggers/need states;
- understanding emotional constructs or core emotional values;
- determining brand image.

While each of the above objectives is independently valuable, when combined, a clear picture for differentiation emerges. (Note: The model depicts each objective with its most relevant component.)

Gathering the "voice of the customer"

Gathering the "voice of the customer" means understanding the product through the consumer's eyes — this means placing more emphasis on the consumer's words than the opinions of management, R&D, engineering, marketing and all other "internal" folks.

Gathering the "voice of the customer" is accomplished by:

• focusing on root wants/needs/benefits of usage; and

• understanding consumer language.

Root wants/needs/benefits (benefits)

Understanding root benefits resides in the following questions: What need does the customer wish to fulfill with the product? What problem is the customer attempting to solve through use? What benefit does the customer wish to receive?

Focusing on these questions helps to reframe our perspective away from the features and characteristics of today's products and direct our attention to the root wants, needs and benefits derived from purchase and usage. An opportunity for innovation lies in uncovering these benefits. For instance, knowing that a consumer desires anti-lock brakes on his vehicle directs the product developer's attention to the same feature time and again. However, knowing the consumer wants to confidently stop quickly on icy surfaces without sliding, skidding or running off the road opens the door to many potential product development solutions.

To ensure an exhaustive list of consumer wants/needs/benefits is gathered, it is important to have a basic understanding of the Kano Model of Quality and to gather needs at each level.

1) Expected Quality (point of entry, grave disappointment if missing). *Example: Car gets me from point A to point B.*

2) Performance Quality (the more, the better). *Example: Car has good fuel economy.*

3) Exciter Quality (if missing goes unnoticed, if present, satisfaction goes through the roof!). *Example: Car helps to prevent me from getting lost in unfamiliar areas.*

Note: An Exciter Quality today may be an Expected Quality tomorrow.

Kano Model of Quality

Consumers typically talk about performance quality without prompting (the key here is to obtain "benefits" versus product features and/or solutions). Expected and Exciter Quality, however, require more effort from the researcher. Several tools to uncover Expected and Exciter Quality include:

Expected: Projective techniques

Exciter: Use storytelling, observation, and/or personal diaries to zone in on current frustrations, modifications, failures, confusion, fears, etc.

Relating lateral products, services or experiences to the product under study also aids the consumer (and the product developer) in thinking more creatively. For example, when investigating consumer needs for automobiles, asking them to think about benefits realized through the use of boats, snowmobiles, motorcycles or all-terrain vehicles may be just the needed bridge to stimulate outside-the-box thinking. Understanding how a particular benefit is carried out in another industry may provide insight to the much sought after "WOW."

Consumer language

Understanding consumer language (what the customer calls it, how the customer describes what they do with it), further enforces the focus on the customer and presents potential opportunities to break product development paradigms. This is achieved by throwing assumptions out the window and asking obvious questions. As the researcher, the key is to NEVER ASSUME you know what the customer means and QUESTION every nebulous term that drifts from the consumer's lips.

Asking the additional "Why?" or "What do you mean by...?" sometimes brings the researcher to new and undiscovered territory. Further, probing for examples related to common terms (e.g., convenience, soft, quick, easy, healthy, etc.) provides the researcher with not only a definition but with snapshots of how the consumer interacts with the product/service. Finally, gaining an understanding of consumer language is often as easy as asking for a synonym to replace the currently used word.

Note: To prepare the respondents for the in-depth probing associated with gathering consumer language it is often helpful to warn them in advance of the obvious or even repetitive nature of your questions.

Identifying key purchase triggers/need states

To bridge the gap between the customer and the product category it is helpful to understand the motivating factors prompting the ultimate purchase of a product. To accomplish this, it is important to have basic knowledge of how and why a purchase occurs, the customer's feelings about the purchase and potential implications the purchase makes in the customer's life.

Understanding key purchase triggers/need states is accomplished through storytelling (third-person) and visualization (specific instances).

It is important to explore motivations in an indirect manner since the answers may be personally sensitive and require the customer to evaluate their "real" motivations, which they may not want to divulge. Approaching motivations indirectly allows the researcher to uncover the conscious as well as the unconscious rationale for purchase while keeping the customer as comfortable as possible.

Due to the indirect nature of these techniques, the analysis is more challenging and requires subjective interpretation to read between the lines and analyze both the spoken and unspoken.

Understanding core values

A core value is the relevant link between a product/brand/category and the consumer's life. If corporations can identify and effectively communicate the core value(s) a product touches, then customers will embrace the product not only because it is a good product (meets wants and needs) but also because it touches them in a personal way. Some examples of core values include peace of mind, longevity, good health and self-esteem.

Investigating core values can be accomplished through:

1. Homework assignment
2. Laddering technique

The laddering technique is used to identify key linkages between product attributes, benefits provided by the attributes, and personal core values. Understanding core values is key to learning how to talk about a product in a meaningful way — this is essential to breaking through the daily advertising clutter that bombards consumers.

A typical customer ladder

includes: product attributes → benefits → core values. Starting the ladder with a product attribute may sometimes make things awkward for the consumer. To make the laddering process easier and more personally relevant, customers are asked to complete a homework assignment prior to the session. Since a picture is worth a thousand words, customers select images, pictures or words that symbolize what the product/brand means to their lives. These images represent the framework of the interview, initiate the laddering technique and contribute context to the analysis. The new ladder looks like this: imagery → product attributes → benefits → core values.

For example, when investigating core values in the airline industry a customer might bring in a picture of a person sleeping in a hammock — this may symbolize the rest and relaxation he wishes he could achieve when traveling by air. Attributes contributing to rest and relaxation may include on-time departures/arrivals, courteous and helpful flight attendants and a smooth (lack of turbulence) flight. These attributes benefit the customer by making him feel mentally refreshed, physically energized and more productive after the flight. When asked how this is personally relevant, it may translate into the values of success and accomplishment.

Relating lateral brands, products, services or experiences to the core values further enhances the understanding of the core value and how it relates to customer's lives. For example, understanding that a two-mile run also makes the business traveler feel mentally refreshed, physically energetic and more productive helps the researcher to better understand the "ideal" in the airline example.

Determining brand image

Understanding brand image and the brand image of competitors is crucial to differentiation. However, while it is imperative to understand where the current brand and its competitors live, it is just as important to understand gaps (where no brands live) because this is where potential opportunity dwells. If a link can be made between identified image gaps and a strong core value (explained earlier) a differentiated, ownable positioning may result.

Understanding brand image and the brand image of competitors is crucial to differentiation.

A combination of projective techniques should be used to gauge brand image for the category. Brand sort and either a brand personification or brand obituary exercise provide a well-rounded picture — including an overview of the category landscape (where brands currently fall and gaps/opportunities exist) and in-depth analysis on two to three focus brands.

Set of tools

The qualitative techniques addressed above are not exhaustive. They are merely a set of tools to begin to better understand the customer. The key is to ask yourself: Now that you've been given a glimpse of the complete picture, how well do you understand your customer?

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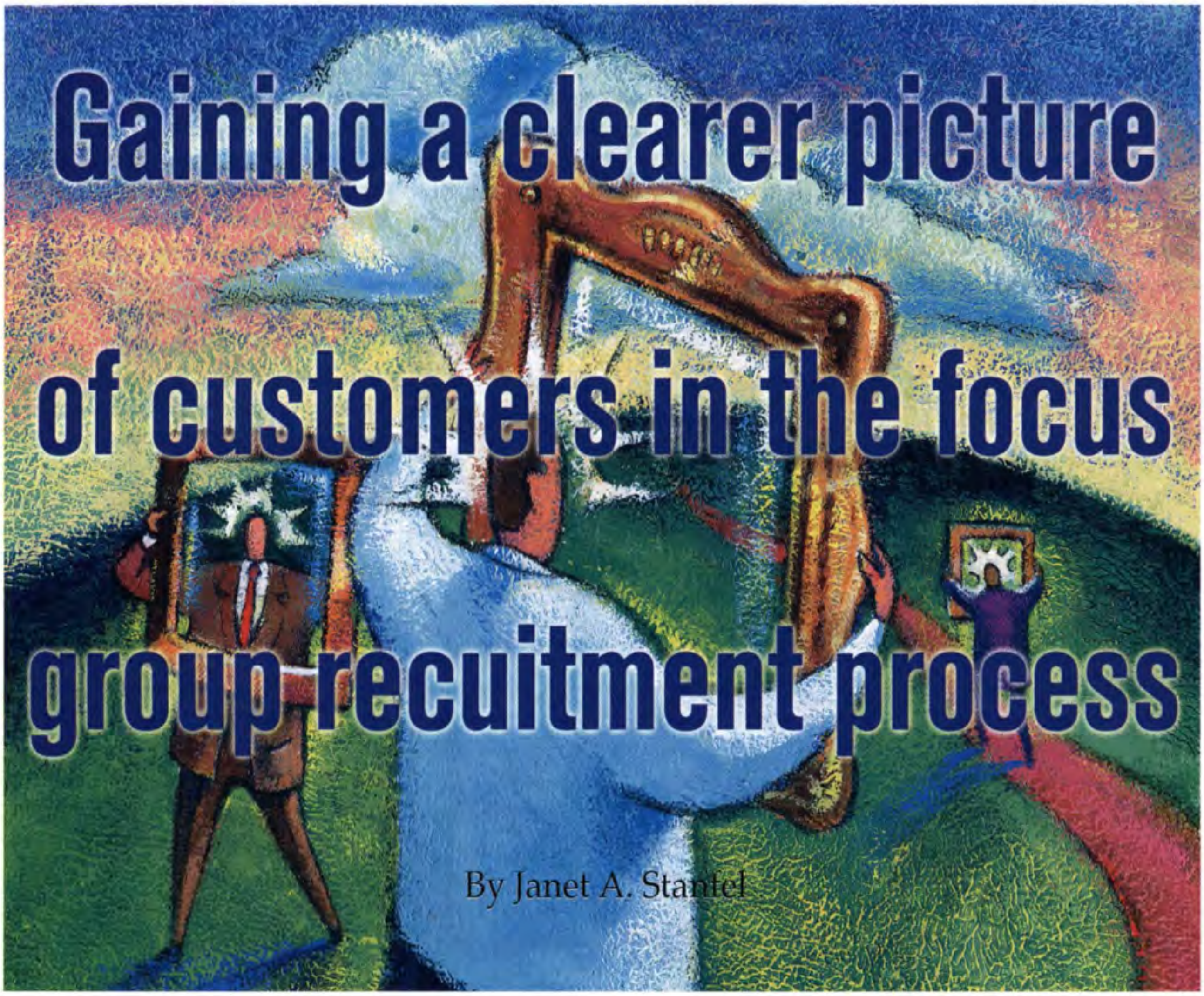
Gaining a clearer picture of customers in the focus group recuitment process



By Janet A. Stanfel

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A good way to maximize the value of qualitative focus group research is to add a quantitative component. This can be achieved in a timely and cost-efficient manner by using participant recruitment as a data collection tool rather than merely a screening process. Traditionally, the singular goal of focus group recruitment screeners is to identify people who fit pre-defined criteria related to demographic indices, purchase patterns, product preferences or other features, in order to invite them to participate in a group discussion with "similar" others. Because it is expected that the recruit will be completed as quickly, efficiently, and economically as possible, the screeners are short, and the only questions that are asked relate directly and solely to the criteria that have been established for focus group discussion participation.

Although the standard approach may result in high-yield recruiting, it falls short in terms of the potential overall value that the research can provide. Our company, AFFINA, advocates taking full advantage of the focus group recruit by adding relevant questions to the screener, and making use of the collected data within the focus group setting, or in addressing other client issues.

This approach to data collection may provide the greatest benefit when focus group participants are being drawn from a client's customer list or database, because it not only presents the client with a prime opportunity to learn more about customer needs, but also contributes to the total customer relationship-building process. This additional benefit is achieved, in part, because in asking a few key questions, (especially when a customer does not qualify for the group due to quotas or other criteria), the recruiter conveys an interest in the customer and sends the message "You are important to us." Moreover, regardless of recruitment status, data that are appended to the current customer database become part of the most essential mechanism for driving customer satisfaction and loyalty.

An opportunity

Every customer contact is an opportunity to learn more about what customers need, want and expect in the way of products and services, what they have purchased in the past and anticipate purchasing in the future. Even the brief contact afforded by a focus group recruiting effort can provide a company with new customer insights. Since the expense of telephone recruiting principally lies in making the appropriate contacts (i.e., getting through to the right person), there is a great deal to be gained by adding a few questions to the screener, with minimal additional expense. It is a creative data collection option that can be used to contribute to a solid foundation of customer knowledge. As indicated, the data obtained from this approach may be used within the context of the focus groups to augment the qualitative research, or may fill other, more quantitative needs.

The quantitative aspect of focus group recruitment can be considered from the following perspective. Recruiting for a "typical" focus group project consisting of four groups will require making approximately 700 attempts to speak with prospective participants. Although 60 percent (or 420) of these 700 attempts will result in actual contacts, another 20 percent will decline to respond to any of the questions or participate in the process at all. This still leaves a significant quantitative sample of 350 respondents or customers who could provide data on a set of questions. In a random sample of n=350, the process yields results with a maximum sampling error of ±6.0 percent with 95 percent confidence. Therefore, the data obtained as a "value-add" to a focus group recruit would be considered statistically reliable if proper sampling procedures were followed.

For use in the focus group discussion itself, the data so collected can be used in drafting the moderator's guide or development of other materials to be used in the group setting. Beyond the focus group setting, and assuming that appropriate sampling techniques have been employed, the data collected in this process can be used as any other quantitative data obtained in a telephone survey.

As one example of this approach, AFFINA conducted a series of focus groups with business customers of a telecommunications provider, and added several questions related to voice mail usage to the screener that was used to recruit participants. The goal of the research was to provide direction for product development and marketing programs. By adding questions to the screener, the recruiting process provided vital information from 132 customers regarding frequency of use, how voice mail was used, and awareness and use of features. The data indicated a relatively low level of usage of the available voice mail features, which was primarily due to a lack of awareness. In this instance, the quantitative findings made it possible to identify an important topic to pursue in the focus group discussions, and led to further development of ideas for educating customers and informing them of the full range of benefits and features.

In another application, AFFINA conducted focus groups regarding alumni donor retention issues for a major urban university. The research was used primarily to better understand donor motivations. The following statistics demonstrate how the final quantitative data was obtained during the effort to recruit participants for four focus groups:

- made 2,889 call attempts (dialings);
- made 953 contacts (spoke directly to a donor);
- completed "interviews" with 238 donors to obtain value-added data.

In this example, the addition of 12 brief questions added an important quantitative component to the program of research. The data rendered valuable insights regarding the strength of donor affiliation with the university, activity involvement and event attendance, recall of solicitation of donations, and motivating factors. The data also provided demographic indices for targeting retention efforts.

For companies that make frequent use of focus groups, it may be advantageous to use the recruitment data collection approach to create an "omnibus" study by adding different sets of questions to focus group recruits over time, and accumulating extensive data on a number of different issues. As indicated, this data could be incorporated into a company's database, or alternatively it could be maintained in separate data file(s) depending upon the company's needs. To the extent that the questions remained consistent, It would allow for a longitudinal perspective on customer preferences and making comparisons over time.

There is yet another reason for recommending the addition of key questions to a focus group recruitment screener. At this time, when consumer and business telephone contacts are becoming increasingly difficult due to active lifestyles and the prevalence of answering machines and voice mail, it is not atypical for 25 percent of all calls in a telephone survey to result in "no answer" or "answering machine/voice mail" dispositions. Therefore, it is simply not practical for any company to overlook any opportunity to talk with customers and obtain supplemental customer information that could be used in many different ways including product development, marketing strategies, development of customer loyalty initiatives, customer segmentation and profiling.

Take it further

We also advocate taking focus group recruitment further by making it part of a dynamic process that both feeds into and draws upon the information in a client's customer database. For example, rather than just calling customers randomly for a market research survey or participation in a qualitative focus group discussion, a database can be "worked" or "mined" to profile the best customers to include in a group given specified research objectives. Therefore, in addition to providing a sampling frame for recruitment, a database is a critical piece in defining group composition and using more targeted, selective approaches to qualitative market research.

With each new recruitment project, data can be collected and added to the customer database. In turn, this new data can be used to advantage in further focus group recruitment efforts, and if key variables are included, the data could also be used in predictive modeling and customer segmentation analysis.

Enriched database

To summarize, by thinking "outside of the box" and taking a somewhat different approach to traditional research methodologies, a company's database can be enriched, and qualitative approaches can be made more valuable. By simply adding a few questions to a focus group screener, companies can make more effective use of the customer contacts that are being made without significantly increasing costs.

Tele-Internet focus groups: an alternative to traditional focus groups

By Karla Buhsmer

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As companies redefine their business strategy to include the Internet, there is a growing demand for market research firms to evaluate user or industry response to the e-commerce or e-services offered on their Web sites. Often, the traditional in-person focus group is not the most appropriate research method for this type of project, given the geographic dispersion that is characteristic among Internet users and clients' sometimes limited research budgets.

A new research method — the telephone focus group accompanied by the visual aid of an Internet Web site — is gaining popularity among clients who are in the initial stages of designing a Web site, and also among those who are adding new features to enhance an existing site. The tele-Internet focus group method is also appropriate for high-tech firms to test Web technologies with 1) industry representatives, 2) businesses that may incorporate such a technology on their site, or 3) consumers who are the intended users of the technology.

The concept

Logistically, the tele-Internet focus group requires two components: a conference call — usually arranged through a conference call service — and the visual aid of an Internet Web site. Each call is assigned an operator who calls participants at the beginning of the focus group, manages calls from participants who are late joining the group, and provides any necessary technical assistance during the call.

For the conference call, the call service establishes a main "bridge line" between the focus group moderator and participants. Another bridge is often created for the client to have listening-only capability into the focus

group, as well as the ability to conduct two-way communication with a representative from the research firm.

Clients work with their Web developers to post new pages on their site for use during the tele-Internet focus group. These pages, which are password-accessible, can demonstrate new Web site technologies, features, and product offerings.

Projects best suited for tele-Internet focus groups

Serving a diverse customer base, the tele-Internet focus group is appropriate for companies from high-tech firms to educational institutions that have developed, or are in the process of developing, their Web sites. Tele-Internet focus groups are commonly used when conducting research for the e-commerce client whose aim is to gain consumer impressions of the virtual shopping experience on their Web site. The method is applicable for financial institutions looking to test-market their on-line banking or electronic stock trading features, and for insurance companies who are interested in testing their customer service sites for services such as 401(k) information and changes.

Universities will find the tele-Internet focus group to be a useful research tool to evaluate the user-friendliness of their electronic course registration feature, as well as other features which enable students to access their academic records or account information.

High-tech firms will find the tele-Internet focus group to be a valuable means of obtaining feedback from industry representatives regarding the feasibility of a prototype Web technology.

The applications of the tele-Internet focus group continue to multiply as the Internet becomes more mainstream among businesses and consumers.

Although the tele-Internet focus group has a wide range of applications, it does not replace the in-person focus group. As with any research method, there are limitations to its application. For example, because a telephone and Internet connection are pre-qualifiers to participation, this method does not lend itself to obtain a representative sample of the general population for those research projects that are not focused on the Internet.

In-person focus groups

Most focus groups are conducted in-person at a focus group facility. The very nature of the in-person focus group — which usually consists of about eight to 12 participants seated around a conference table — helps foster familiarity among participants. As the comfort level within the group increases, participants tend to speak more openly about the research topic. Ideally, this familiarity leads participants to introduce new ideas for discussion. In-person focus groups also enable the moderator to interpret participants' body language and to elicit responses from quiet participants whose reactions are demonstrated by a simple nod of the head or a shoulder shrug.

Effectiveness of tele-Internet focus groups

The importance of creating a bond among participants and the moderator's ability to interpret body language are key elements that the tele-Internet focus groups must seek to closely replicate. The use of the Web site is an important visual aid to create a bond among participants. As the moderator guides participants through the Web site and the impressions are shared about the site, participants become more familiar and comfortable with the tele-Internet focus group setting.

Our experience indicates that there are several effective steps the research firm can take to plan and conduct a meaningful tele-Internet focus group. To ensure that participants actively participate, the research firm should limit the focus group size to about six participants. Creating an environment that enables the participants to talk socially among themselves at the beginning of the group is an effective means to overcome the group's inability to see one another. Participants will feel more comfortable to openly express their opinions once they are familiar with one another.

It is important that the moderator associate each participant's name with his or her voice. Having participants identify themselves prior to speaking will assist the moderator in drawing conclusions more effectively — both during the group and afterwards, when reviewing the audiotape or transcript — about a participant's impression of the subject.

A key element to a successful tele-Internet focus group is to keep participants involved throughout the discussion. The moderator should avoid lengthy introductions and demonstrations, as tele-Internet participants will quickly become disinterested and distracted. The moderator should also be prepared to eliminate the dead air that often occurs during the time period when participants are accessing a Web site or page.

At the end of the tele-Internet focus group, the moderator should invite participants to stay on the telephone to continue their discussion or to converse about other topics of interest. Lastly, the moderator needs to provide contact information, such as an e-mail address or telephone number, so that participants can contact the moderator after the group. Several participants have e-mailed me to say they enjoyed participating in the tele-Internet focus groups that I have moderated.

Advantages of a tele-Internet focus group

Based on client and participant reception, tele-Internet focus groups are often recommended in place of an in-person focus group. There are several arguments to support the use of a tele-Internet focus group over the traditional focus group approach. The strongest argument is cost. Tele-Internet focus groups usually cost about 90 percent less than in-person focus groups. A traditional focus group requires renting a room at a focus group facility, whereas the tele-Internet group requires a small investment to establish a conference call with a conference call facility. Also, traditional focus groups that involve the Internet require the rental of computer equipment and an Internet connection.

As most Web sites seek to conveniently sell products and provide services to a geographically disperse group of users, the tele-Internet focus group enables research firms to cost-effectively obtain a representative geographic sample—whether it be from across the U.S. or more focused on a smaller geographic group. To meet these research goals using the traditional in-person focus group, a research firm must conduct several in-person focus groups in different geographic locations at a high cost to the client.

Time is a valued rarity and the tele-Internet focus group requires less of a time commitment than the traditional focus group. Participants can take part in a tele-Internet focus group from their office or home and do not have to travel to a focus group facility. The elimination of travel time to a focus group facility provides greater scheduling flexibility. As a matter of fact, tele-Internet focus groups are often scheduled during participants' lunch or later in the afternoon.

The convenience of the tele-Internet focus group, coupled with the novelty of the research approach, is likely to encourage participation. With the increasing use of the Internet by the general population, and the popularity of the Internet in the media, consumers are often curious about the research subject and demonstrate a willingness to participate in the group. Not surprising, participants from the high-tech industry are often easy to recruit due to their interest in keeping pace with the changing Internet technology.

Valuable method

The tele-Internet focus group is a valuable research method for the client who seeks user or industry information about their Web site or Web technology. As companies continue to redefine their business strategy to respond to consumers' demand for e-commerce and e-service features on the Internet, research firms must continue to propose research methods that best meet the research goals of the Internet-focused client.

Survey Monitor

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(50 percent).

The research also shows wide interest in packages that can be harmlessly composted or put in the garbage disposal, packages that can be stored anywhere from fanny packs to desk drawers, and packages that go beyond now-standard tamper resistance to indicate abuse that sometimes causes damaged or broken contents.

Packages that notify consumers when leftovers have gone bad also have wide appeal. They would be a boon to millions of consumers who regularly suffer from refrigerator crowding and leftovers gone bad. For more information call Mona Doyle or Charles Ebner at 215-235-2400.

Credit card users seek low rates, not prestige

Consumers are responding to platinum credit card offers for low rates, not perceived prestige or rewards programs, according to a study conducted by Tampa, Fla.-based PSI Global. The firm's 1999 study of the U.S. card market found that 51 percent of households opening a platinum account in the last year said a low rate was the most important factor in their decision. This compares to 27 percent who cited a low interest rate among those opening a gold account and 20 percent opening a standard account.

"In general, the marketing power of low interest rates far overshadows high potential credit lines, rewards and enriched enhancements as drivers of platinum account openings," says Gregory Weed, a PSI vice president responsible for card industry research. "Platinum cards have not developed as an upper-end of the market so much as they have fostered a rate-sensitive franchise that cuts across income groups."

While platinum ownership skews to upper-income brackets, interest rate is the most important factor in account acquisition at all income levels. Specifically, the PSI research found that interest rate was the most important factor to 48 percent of households with annual incomes of more than $75,000; 57 percent among the $50,000 to $75,000 category; and 34 percent among those under $25,000.

Among all platinum account openers, a higher credit line was important to only 5 percent. However, the PSI study found that among those with incomes of less than $25,000, about 9 percent wanted more credit. In contrast, just 1 percent of account openers with incomes above $75,000 said more credit was important.

Just 1 percent of new account openers cited enhancements (purchase protection, extended manufacturers' warranties, free collision/damage coverage on rental cars) as the most important reason for opening an account. Rewards are more important to upper-income consumers and gold account openers.

Consumers do not think that platinum card services are superior to gold or that gold services are superior to those of standard cards. "Thirty-six percent of card owners think there is no difference between platinum and gold cards, and nearly half are neutral. Any perceived difference that does exist cannot be ascribed to prestige imagery or privileged service. This holds true across income groups and across owners of the different platinum brands — American Express, Discover, MasterCard and Visa," Weed says. For more information call 813-371-3800 or visit the company's Web site at www.psi-global.com.

Consumers respond to DTC ads

A report from BioInformatics, Inc., a Bethesda, Md., market research and consulting firm, shows strong consumer receptivity to direct-to-consumer (DTC) pharmaceutical advertising on the Web. In a survey of more than 1,000 on-line consumers with an interest in health-related topics, 54 percent reported they have visited a Web site operated by a pharmaceutical firm for the purpose of learning more about a specific prescription drug in the last six months.

A second survey was administered to a group of more than 500 health care professionals experienced in the use of the Web. Forty-five percent of that survey group responded that they too have visited a pharmaceutical company's Web site within the last six months.

As consumers continue to exercise their newfound power in their relationship with the health care system, the Web can be expected to be an indispensable source of the information and knowledge needed to make informed decisions. Less certain, however, is the role pharmaceutical companies will play in disseminating health-related information in a way that ethically meets the information needs of consumers while advancing the commercial interests of the company.

The study was conducted using on-line questionnaires completed by two distinct panels of experienced Web users. The dual approach was deemed necessary because of the challenge facing DTC marketers — the presence of a professional intermediary who has no equivalent in traditional consumer goods markets. "The nature of pharmaceutical products dictates that physicians and pharmacists are not simply 'middlemen' who can be bypassed," says Bill Kelly, BioInformatics president. "We believe the perspectives of both professionals and consumers have to be taken into account in any on-line DTC campaign.

"Companies have to realize that the Web is a two-way communications medium. When developing a Web marketing strategy, it is essential to consider the medium's unique strengths, rather than simply revising strategies developed for traditional broadcast and print media," says Kelly. "Consumers generally won't spend a great deal of time looking at an ad, but they will spend time exploring company Web sites that are useful or interesting to them. If a drug company's Web site can truly contribute to improving a patient's quality of life, brand loyalty and market success will naturally follow."

Most of the consumer respondents claimed it is "very" or "somewhat" likely that they can use the Web to find better information on a new medication than what their doctor or pharmacist has in his/her office. Indeed, 52 percent of the professionals surveyed do not feel they have adequate time to stay abreast of new pharmaceutical treatments coming on to the market.

Among the consumer panelists, the Web ranked third as the most common source of information about prescription medications — slightly behind doctors and pharmacists. At the same time, an overwhelming majority of health care professionals stated that patients with access to medical information from the Web are more likely to question their physician's competence or advice.

Pharmaceutical companies in the U.S. spent approximately $1 billion on DTC advertisements in 1998, and its impact was clearly revealed in the survey results: 63 percent of the consumer respondents have requested a prescription drug by brand name. A high percentage of the consumers surveyed were also able to correctly identify the conditions that 10 heavily advertised drugs are intended to treat.

Kelly believes the interactivity of the Web presents an important marketing opportunity for pharmaceutical companies. "Companies need to think in terms of Web site 'users' — not 'visitors.' By providing the right information and tools that physicians and their patients can use together, the Web site will change in the way professionals and consumers relate to one another."

The trend toward "empowered patients" hinges on access to health information, and increasing access to the Web is clearly affecting the health care professional-patient relationship. "The goal of the Web marketing team in this situation is not to tip the balance between one side and the other, but to bring them together."

For more information call Karen Blaine at 301-961-1985 or visit the company's Web site at www.bioinfoinc.com.

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Younger viewers are least desirable TV audience

A study of some 2,000 TV commercials says that younger TV viewers, in general, are less likely to be persuaded by TV advertising than older viewers. Specifically, the youngest category of viewers (ages 16-29) is 32 percent less likely to be influenced by TV ads than the average viewer while the oldest audience group (age 50 and up) are 21 percent more likely to be persuaded than the average viewer.

This finding is opposite conventional advertising industry wisdom, which says that younger TV viewing audiences are usually more appealing to advertisers.

The study was conducted by rsc The Quality Measurement Company, an Evansville, Ind., research firm. On an ongoing basis, large groups of randomly selected consumers participate in the evaluation of TV advertising in rsc labs.

The second-most important demographic in determining how different groups of people are influenced by TV ads for consumer products is gender, the study found. In this instance, women were 10 percent more likely to be persuaded by TV ads than the average perception of all viewers while men, in general, were 16 percent less likely to be influenced.

The most affluent households (upscale suburbs) were the demographic group least influenced by TV advertising while large households with children were much more responsive to TV commercials for consumer goods. Respondents in homes (average age of 50 and up with children) were 30 percent more likely to be influenced by TV ads than the mean respondent. For more information call Margaret (Meg) Blair at 812-425-4880.

B-t-B Web study challenges conventional wisdom

A study of best practices of business-to-business manufacturers by QDI Strategies, a Chicago consulting firm, on their use of the Web uncovered results that challenge conventional thinking about biz-to-biz use of the Web. Some of the findings include:

Conventional wisdom: Put Web functions up quickly and refine them.

Study findings: While true for most functions, the study found this was not the best way to create e-commerce sites for existing customers.

Conventional wisdom: Create an executive steering committee.

Study findings: The best steering committees are staffed with managers who can work with their respective functional areas, not executives.

Conventional wisdom: The power of the Web is in selling direct.

Study findings: Best-practice firms build channel and end-user power with information. Best-practice firms are generally not eliminating their distributors and dealers.

Conventional wisdom: It is too late to overtake the leaders on the Web.

Study findings: The "mega" distributors may displace the early niche distributors. Manufacturers need to assess a Web channel's long-run potential.

Conventional wisdom: Big manufacturers get good positions on their channels' Web sites.

Study findings: Manufacturers who support e-channels get good positions in the channels' Web sites.

Conventional wisdom: Manufacturers must either sell direct or sell through channels.

Study findings: Best-practice firms negotiate who is responsible for each activity.

Conventional wisdom: Web team leaders are hard to find/steal.

Study findings: Best-practice firms tap their own IS and marketing managers with broad experience as Web team leaders.

For more information call Michael Barr at 312-739-2020 ext. 225 or visit the company's Web site at www.qdistrategies.com.

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848-0842 or visit the company's Web site at www.newstrategist.com.

New corporate reputation index from *Fortune*, Roper Starch

Fortune magazine and New York research firm Roper Starch Worldwide have joined forces to launch the *Fortune*/Roper Corporate Reputation Index, a research product that surveys both business executives and consumers on what they admire most, and least, about companies in the *Fortune* 500. This new product, based on the magazine's annual survey of "America's Most Admired Corporations," will include new, unpublished corporate reputation data enabling individual companies to benchmark themselves against the competition and the industry as a whole. The *Fortune*/Roper Corporate Reputation Index will be available as a stand-alone product to be released in April following the release of the "America's Most Admired Companies Survey" in the February 21 issue of the magazine. Data for the *Fortune*/Roper Corporate Reputation Index is based on the opinions of more than 12,000 consumers, individual investors and influential Americans surveyed specifically for the Index, coupled with responses from the more than 10,000 executives and industry analysts currently involved in the magazine's "America's Most Admired Corporations" survey. For more information call 212-599-0700.

Study examines Bay Area attitudes toward nontraditional health care

Marchione & Spero Research Center, Walnut Creek, Calif., has released its 1999 Benchmark Study on The Bay Area's Attitudes Towards & Experiences with Nontraditional & Alternative Healthcare. The study is based on interviews with 240 Bay Area residents, who were asked about their current health and health care behavior, including visits to any type of health care provider over the past year. The interviews included questions on attitudes (first impressions and personal feelings) toward alternative medicine approaches and personal and indirect experiences with non-traditional medical approaches (when and for what), and how they rated the outcome of nontraditional treatments and whether these treatments were covered by insurance. For more information call Steven Spero at 925-210-1525 ext. 206.

Harris Interactive launches youth-oriented Web portal

Harris Interactive, a New York market research company, has launched i-matter.com, a youth-oriented portal in conjunction with The Harris Youth Poll, a study of youth attitudes and behavior that is designed to keep clients abreast of the ever-changing youth culture. I-matter.com offers a virtual community where kids and teens learn about polling, take part in opinion polls, and discuss their opinions. This site will serve as the meeting point for the on-line community of young people that Harris Interactive will ask to participate in survey research. The site also serves as the polling "channel" for many youth sites and many of Harris's partners have chosen to link their youth-oriented sites to i-matter.com.

Updated ArcView now out

ESRI, a Redlands, Calif., GIS software firm, has introduced ArcView Business Analyst 1.1, the firm's desktop GIS product. It provides ArcView GIS with data analysis tools and a catalog of 1999 business, demographic and household data for the U.S. Data selections include: 1999 business listings from Dun & Bradstreet, with SIC codes, company name, address and sales and employee information when available; current year household consumer information from Experian; nationwide demographic data; and a nationwide street database from Wessex. For more information visit the company's Web site at www.esri.com/routmapims.

ew software from TelAthena

New York software firm TelAthena Systems LLC is now offering a Linux version of its TelAthena Human Interaction System, a software system for scripting and call center management. The TelAthena Human Interaction System is fully ODBC- and SQL-compliant and includes tools to facilitate the exchange of information via the telephone or the Web. TelAthena interfaces with predictive dialing systems and with TSAPI or TAPI compliant telephone systems. The firm has also released its Web based Real-Time Statistics (WRTS) reporting tool for the TelAthena Human Interaction System. The WRTS reporting system provides supervisors and managers with real-time information regarding the actual progress of inbound or outbound campaigns, groups within the campaign and individual agents. For more information visit www.telathena.com or call 888-777-7565.

New SEM software from SPSS

SPSS Inc., Chicago, has introduced Amos 4.0, new modeling software that uses structural equation modeling (SEM) to help users create, verify and modify data mining models. The software provides a graphical environment for all steps of the modeling process; users specify, estimate, assess, modify and present their model using Amos' drawing tools. Amos delivers a picture of the model that enables users to see the relationship of the variables. Users can also create models to verify not only how but also why variables affect each other. For more information call 312-651-3000 or visit the company's Web site at www.spss.com.

Survey system from NCS

National Computer Systems (NCS), a Minneapolis research firm, has introduced the NCS professional survey system, featuring SurveyTracker software. The system includes built-in tools that provide shortcuts and guidance for designing surveys, selecting the audience, administering the surveys and reporting and interpreting the results. At the heart of the system is SurveyTracker software, which is available in four versions: SurveyTracker Plus E-Mail/Web; SurveyTracker Plus; SurveyTracker E-Mail/Web; or SurveyTracker Classic Software. For more information call 800-447-3269 or visit the company's Web site at www.ncs.com.

NIRI offers census-based sales data product

Information Resources, Inc. (IRI), Chicago, has released multi-outlet competitive sales data for the marketing areas of over 50 food, drug and mass merchandiser retailers nationwide. The new Multi-Outlet Competitive Retailer Marketing Areas are customized geographic areas that correspond to the way a given retailer defines its marketing area. They include all of the retailer's own stores as well as stores of competitors that fall within that geographic area. IRI's new offering covers three classes of trade, combining data for grocery, drug and mass merchandiser retailer marketing areas. For more information call 312-726-1221 or visit the company's Web site at www.infores.com.

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safety issues. Not surprisingly, spills and boil-overs were major culprits. Metaphase also conducted a general examination of the task of food preparation. "We tried to understand the whole process, from how people store cookware to how they work with it during meal preparation and clean up," Ritzel says.

With those issues in mind, a three-person team (a videographer, a Mirro representative, and a Metaphase representative) went into the homes of consumers in Boston, San Francisco and St. Louis and videotaped the meal-making process. The researchers made sure to conduct the interviews in a variety of kitchen sizes and include consumers from diverse incomes and ethnic backgrounds.

"In simplest terms, we found that the American public is very accommodating of their cookware," Ritzel says. "They have all kinds of things that they struggle with but people make do, or work around it or put up with it."

The sessions produced a lot of valuable findings, says Gerry Paul, Mirro's manager of future product development. "We noticed that people use metal utensils in their non-stick cookware, which is a no-no. They used forks to stir and turn items. Everyone had the spatulas you're supposed to use with non-stick coatings but there's nothing like a good old fork. Some of them caught themselves and said 'Oh, I'm not supposed to be doing this, am I?'

"Pouring was another problem, as was moving food in and out of the pan. And people didn't know what to do with their lids while they were cooking. They complained about the mess that lids leave when you have to set them on the counter or on the stove top."

And then there were the problems with non-stick surfaces. "People have had a lot of bad experiences with non-stick," Ritzel says. "They like it but it either didn't last or it didn't really work. And basically what they said was, give us non-stick that works or get it out of there."

Stay out of the way

For the observational interviews, respondents were given a specific meal-making task. As much as possible, the observers tried to stay out of the way and let the respondents do what came naturally. "When they did something out of the ordinary we would ask questions," Ritzel says. "It was funny to see them do some of the things that they did routinely, which flew in the face of what cookware people think they do. Typically the first question we asked was, 'Could you open up where you store your pots and let us see inside there?' They all had a fit. Each one of them said, 'I have the messiest cabinet in the world!'"

After the cooking observation, the interviews were expanded to what Metaphase calls Buddy Groups, for which friends and neighbors of the respondents were invited over to discuss cooking-related issues.

"From that we learned some of the variations of how people do things and we also had a questionnaire for them to fill out and an interview process to walk them through to obtain more information," Ritzel says.

Embody the learning

Armed with the consumer product safety data, findings from the in-home interviews and videotapes, and information on usability and ergonomic issues, Metaphase set to work. "The first pass was just developing concepts that came from all of the information we had. The key was to funnel it all into a product that embodied all we had learned," Ritzel says.

It was during this phase that inspiration struck, leading to Allegro's unique round-to-square shape. "One of the thoughts that came up was to look at this thing from a real functional perspective," Ritzel says. "In most cases, the heat sources on a stove are round. The cookware is, for the most part, round. Yet for efficient use of space you think square. My idea was to use space more efficiently. Because you could make something that was a little shorter and take up a lot less room if you did something that was square. All of the other benefits came from that initial thought. It enabled the user to pour more easily. And the addition of a second handle gave better stability in transportation."

Making the cookware usable for cooks of all ages was high on the priority list, with the ranks of older cooks swelling as Baby Boomers age and, on the opposite end of the spectrum, growing numbers of younger cooks who may have to fend for themselves before mom or dad comes home from work. "Certain elements of the design came easily. Knowing that the average 65-year-old has 25 percent of the strength of a 25-year-old, we knew we wanted to make the cookware lighter. Aluminum proved to be the perfect material. The handle design was tapered so that it fits over 95 percent of the population and accommodates different grip styles," Ritzel says.

Once prototypes were developed, they were also tested with consumers. Mirro's Gerry Paul says that's when things got exciting. "You could see that consumers understood the cookware intuitively. They figured things out without being told."

Replaced traditional focus groups

Ritzel says that Buddy Groups have replaced traditional focus groups in many of the projects Metaphase works on. "We have always been disappointed with the performance factor of focus groups and the lack of comfort people can feel if they are in a room full of strangers. Nobody wants to look stupid. In traditional groups you get some people who figure out what the moderator wants them to say or people who fall in line with the talkers. And there are some you have to shake to make sure they are awake."

"With traditional focus groups you get the dominant person and a few who are there for the money, and a couple who are in between," Paul says. "With [the Buddy Group approach], there's no need to break the ice, everybody knows each other. We got information out of everybody. Nobody was afraid to speak."

Topped expectations

Allegro sales have topped expectations, and production has finally caught up with the overwhelming demand generated by the early infomercials. "Consumer reaction is very good," Paul says. "Acceptance by potential retailers has been phenomenal. They're waiting in line to get Allegro on their shelves. The ratio of sales dollars to media expense is very positive. We're very happy with the numbers."

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ucts, have grown from \$3.5 billion in 1994 to nearly \$7 billion in 1999.

6. Extra care and indulgence rewards — sales of premium ice creams and premium-priced toothbrushes are growing rapidly; aromatherapy helped boost candle sales to \$833 million.

7. Female influence — with 60 percent of adult females working outside the home, sales of many beauty categories are up over 55 percent; conversely, hosiery sales have declined in today's casual workplace.

The Arbitron Company, New York, has released its first Webcast ratings report, bringing broadcast-style audience measurement to the streaming media industry. The ratings firm determined that, in the month of October, more than 900,000 listeners tuned to 240 channels of audio programming offered by the first four streaming media servers to participate in the company's new Internet audio ratings service. This first InfoStream ratings report compiled total audience estimates and average time spent tuning during the month of October for listeners to 240 Internet audio channels being streamed by ABC Radio Networks, BroadcastAmerica.com, LaMusica and Magnitude Network. The InfoStream service determined that, for these four streaming content providers, Internet listeners spent over 1.3 million hours listening tuned to Internet audio during the month of October. Internet listeners logged 36,000 hours tuned to the channels streamed by LaMusica; 41,000 hours to BroadcastAmerica.com channels; 440,000 hours to the Magnitude Network channels and 816,000 hours to the channels streamed by ABC Radio Networks. The top three InfoStream outlets in terms of total listeners for the month of October are www.texasrebelradio.com, the Magnitude Network-streamed programming of adult alternative station KFAN-FM of Johnson City, Texas, with 83,900 cumulative listeners; www.kpig.com, of adult alternative station KPIG-FM, Monterey, Calif., with 70,200 listeners; and, www.cd93.com, of modern adult contemporary station KCDU-FM, Monterey, Calif., with 66,300 listeners. In terms of time spent tuning, the top three Internet channels were: www.smoothjazz1059.com, the smooth jazz ABC station WJZW-FM, Washington D.C., streamed by Real Broadcast Networks, with eight hours and 26 minutes average time spent tuning; www.kpla.com, the adult contemporary station KPLA-FM, Columbia, Mo., with six hours and 32 minutes; and www.wkdd.com, the hot adult contemporary station WKDD-FM, Akron, Ohio, with five hours and 26 minutes average time spent tuning.

"This first InfoStream Report, although just a sampling of the huge online Webcast listening market, clearly indicates that small market broadcast stations are getting a big boost in audience thanks to streaming their programming on the Internet," says Joan FitzGerald, director of marketing, Arbitron Internet Information Services. "The leading Internet radio station in our first report isn't even in an Arbitron rated metro, yet its Webcast on Magnitude Networks posted a cumulative audience that exceeds that of many stations in top-rated metropolitan areas."

InfoStream is a server-side measurement, which captures all tuning to participating streamed media channels by compiling a census of Internet tuning sessions of unique players. This first InfoStream ratings report compiled cume audience estimates and average time spent tuning during the month of October for listeners to 240 Internet audio channels being streamed by ABC Radio Networks, BroadcastAmerica.com, LaMusica and Magnitude Network.

Answers Research Inc., Solana Beach, Calif., has formed a domestic IT panel to accelerate the company's ability to provide actionable research to its clients. The introduction of the Web-deployed panel is intended to reduce non-response bias associated with traditional recruitment methods while decreasing overall research costs. The panel will include information technology managers and chief information officers in the U.S., representing a cross-section of industries, who have agreed to participate in ongoing IT research to assess trends and to evaluate new advanced technology products and services. The types of studies for which the panel will be utilized will range from straightforward quantitative studies to new product concept testing to conjoint surveys. Answers Research developed the panel in response to increasing over-sampling of advanced technology decision-makers in the U.S. "U.S. IT managers and CIOs are one of the most over-surveyed groups of respondents in the world," says Pat Funes, Answers Research's vice president of operations. "We have seen a dramatic reduction in response rates — a 46 percent decline in willingness to participate in the last four years. Our response to these realities was to form a panel of qualified professionals interested in influencing the design of future products and services." In exchange for panel participation, panel members receive regular honoraria and access to general IT facts gleaned from Answers Research-sponsored studies.

Northern Light Technology, Inc., a Cambridge, Mass., search engine developer (www.NorthernLight.com), and **DeepCanyon**, a Seattle-based Hewlett-Packard e-publishing company that provides research to technology marketers (www.deepcanyon.com), announced a partnership in which DeepCanyon will deploy Northern Light's search capabilities to enhance its customized market research. The agreement provides access to the Web and selected sources from the Northern Light Special Collection, an on-line business library of trade publications, journal articles, and industry and market research reports.

The management team of **Greenfield Online Inc.**, a Wilton, Conn., research firm, has purchased the company from Andrew Greenfield. Details of the private transaction were not disclosed. Separately, the firm announced the signing of a \$6.0 million banking facility with Greyrock Capital of Los Angeles. The facility will be used to fund Greenfield Online's Internet-based information and market research services model. Greenfield Online has experienced 300 percent year-over-year revenue growth and is expected to con-

Earnings**Watch**

In earnings news, **SPSS Inc.**, Chicago, announced results for the quarter ended September 30: net revenues of $34.3 million and diluted earnings per share of $0.43.

ACNielsen Corporation, Stamford, Conn., reported a 32 percent increase in net income for the third quarter. Net income reached $23.4 million, or $0.39 per diluted share, versus $17.7 million, or $0.30 per share, in the prior year. Reported revenue, at $381.9 million, rose 4.7 percent, but was 6.8 percent higher before translating foreign currencies to the U.S. dollar. Operating income reached $36.9 million, up 28.2 percent, including $2.6 million in expenses for Year 2000 software modifications.

Opinion Research Corporation, Princeton, N.J., reported record quarterly earnings of $0.16 per diluted share for the third quarter ended September 30, an increase of 78 percent compared to $.09 per diluted share in the same period last year. The company also reported that earnings for the first nine months of 1999 were a record $0.41 per diluted share, an increase of 58 percent compared to diluted earnings of $0.26 per share in the first nine months of 1998.

NFO Worldwide, Inc., Greenwich, Conn., reported that revenues for the third quarter increased 70 percent to $111.2 million from $65.5 million for the same period last year. Operating income increased 71 percent to $9.5 million from $5.6 million a year ago, reflecting a favorable business mix. Although recent acquisitions caused increased interest expense and a higher effective tax rate, net income for the quarter increased 39 percent to $3.6 million from $2.6 million reported last year. Diluted earnings per share increased 33 percent to $0.16 per share from $0.12 per share a year ago.

Total Research Corporation, Princeton, N.J., reported revenues of $13,790,950, a 37 percent increase over the corresponding period of the previous year, and net income of $624,638, a 20 percent increase over the same period. Net income translated to $0.05 of diluted earnings per share vs. $0.04 of diluted earnings per share in fiscal 1999.

SPAR Group, Inc., Tarrytown, N.Y., reported results for its third quarter, representing the first consolidated report since the merger of the prior SPAR Group companies and PIA Merchandising Services, Inc. in July. For the third quarter, SPAR recorded pro forma net income of $98,000, or $0.01 per pro forma diluted share, compared with pro forma net income of $1.3 million, or $0.10 per pro forma diluted share, in the 1998 third quarter. These results are based upon a 45 percent increase in the pro forma diluted weighted shares outstanding in the 1999 quarter. Revenues for the same period increased more than threefold to $36.4 million from $11.1 million a year ago.

tinue at this rate into the year 2000. The firm also announced the first of two moves to accommodate its growing online marketing research business. In November, the company opened the doors to a new 20,085 square-foot facility in Wilton where it will reside pending the completion in fourth quarter 2000 of a 30,000 square-foot executive campus building in the same complex. The new headquarters include a technology center designed to house the proprietary Web-survey system and technology infrastructure that support the company's on-line marketing research capabilities.

InsightExpress, an on-line research affiliate of Greenwich, Conn.-based **NFO Worldwide**, is offering a fully automated on-line market research service. Supported by the profile-driven targeting services of Engage Technologies, and backed by NFO Worldwide, InsightExpress provides consumer focused managers with real-time access to targeted consumer groups and to existing customers via their own lists. InsightExpress enables decision-makers to test new ideas, screen new concepts, gauge customer satisfaction, survey employees, test advertising and gather insight into the needs, attitudes and behaviors of consumers.

ACNielsen Corporation, Stamford, Conn., has acquired **Media Monitoring Services Ltd. (MMS)**, an advertising measurement service headquartered near Ascot, England. The firm covers the U.K.'s $22 billion advertising industry, tracking advertising activity, spending and creative content across the print, television, radio, direct mail, cinema and outdoor channels for media companies, agencies and advertisers. Its U.K. business, along with smaller operations in Australia and Asia, generated revenues last year of $10 million.

Los Angeles-based **Lieberman Research Worldwide** has acquired, in partnership with Lieberman Research Group in New York, **Opinionsite.com**, a full-service Internet research company offering panel and data collection services. Opinionsite.com will continue to be led by Andrew Korman, its founder and president.

Video Research Ltd., a Tokyo-based media and marketing research and consulting firm, has launched Video Research Net-com Ltd., an Internet audience research company that provides coverage of audience interaction with Web sites, ad banners and e-commerce transactions. In measuring Internet audiences, Net-com uses metering methodology developed by NTT, licensed trough NTT Advanced Technologies, to measure actual Internet audience usage behavior in real-time. Currently 3,000 sample households are under measurement in Japan with the test data due to be delivered in January. Commercial services will follow in April.

Survey.com and CMP Media's *Intelligent Enterprise* magazine have formed a cooperative research partnership designed to produce a series of surveys and reports on the business intelligence and data warehouse

(BI/DW) market. Cooperative projects will identify and track the major trends, issues, and growth areas in the burgeoning BI/DW market.

Charleston, W.Va.-based **McMillion Research** has formed a partnership with Denver-based **Paragon Research.**

New York-based **Jupiter Communications Inc.**, an Internet commerce information firm, has expanded into Latin America with the launch of a new research service, a version of the company's Internet Commerce Forum for the market in Latin America (see Research Calendar for listing), access to one of the region's consumer research panels, and the establishment of a company sales presence in the region. At the core of Jupiter's expansion into the region is the launch of the Latin America Market Research Module, which will include a series of reports and analyst notes addressing the outlook for Internet access, on-line retailing, on-line advertising, and other opportunities in the region. Jupiter will have an exclusive arrangement with IBOPE, a Latin American research firm based in Brazil, to conduct primary data collection of the Internet economy in Latin America. Jupiter is building a sales presence in Latin America to distribute its range of research products, through a series of reseller agreements. Jupiter will manage the selling of its products through its relationship with IBOPE. Similar agreements are anticipated over the next several months for other countries in the region.

Capita Research Group, Blue Bell, Pa., has conducted a market research test of Internet banner ads supplied by U.S. Interactive, an Internet professional services firm. The test assessed the ability of Capita's Engagement Testing System to accurately identify from a cluster of banner ads those with high click-through rates. Capita tested 48 respondents by showing them portal sites and then the banner ads. Using the firm's electroencephalogram (EEG)-based technology, respondents' brainwaves were measured for relative levels of attentiveness as they watched. "Our system successfully identified the banner ads with the highest real-time click-through," says David Hunter, Capita's founder and CEO. The company conducted its own independent follow-up study that validated the results of the first test.

Mature Marketing and Research, Boston, has introduced the MMR Boomer Poll, which will survey consumers born between 1946 and 1964 on attitudes, motivations and product and service choices in the following categories: financial (banking and investment), travel and leisure, personal care and health care, food products, fast-food, and automotive. For more information contact Leslie Harris at MMRHARRIS@aol.com.

Cyber Dialogue has moved its offices down a few floors and now has a new address and phone number: 304 Hudson St., 4th floor, New York, N.Y., 10013. Phone 212-651-7000.

Arbitron is now offering a new release of its Tapscan agency planning and buying software. Version 5.6 now has a 21+ age break, socioeconomic demographics, and access to Arbitron's Qualitative Diary information. The firm has also released a faster version of Arbitron Data Express (ADE 2.1), which allows media professionals to download their Arbitron data. It is now available to registered users free of charge through the Arbitron Data Express link at www.arbitron.com/ade/.

Richard Kurtz & Associates, a qualitative research consulting firm, has moved to 24 E. 21st St., 4th fl., New York, N.Y., 10010. Phone 212-353-3020. Fax 212-473-3440. E-mail: kurtz@ziplink.net.

San Diego-based information provider **Claritas** has redesigned its www.sitereports.com Web site. Using customer feedback, Claritas has enhanced the site's interface, provided a greater range of report and payment options, and added other new features.

National Computer Systems, Inc., a Minneapolis information services firm, has been certified by the National Committee for Quality Assurance to conduct Consumer Assessment of Heath Plan Study (CAHPS 2.0H/PPO) and Management of Menopause (MoM) surveys for the year 2000.

Canandaigua Wine Company has chosen **Information Resources, Inc.**, Chicago, as its primary syndicated scanner data supplier in a new long-term agreement that extends into 2005.

Maritz Marketing Research, St. Louis, is establishing an office in Mexico City, Mexico. Ricardo Rene Calva Lopez will manage Maritz's research activities in Mexico, focusing on the automotive industry. The office, Maritz Motivation de Mexico (Maritz Performance Improvement Company of Mexico), will be located at 78 Gobernador J.G. Covarrubias, San Miguel Chapultepec, 11850, Mexico City, D.F. Phone 52-52-72-6136. Fax 52-52-72-6454.

Separately, Maritz Marketing Research has changed the name of its Maritz AmeriPoll consumer survey to Maritz Poll, reflecting the expansion of the poll to include respondents outside of the U.S. The poll's Web site URL is now www.maritzpoll.com.

Nancy Hardwick Market Research Services has changed its name to Hardwick Market Research Services and has moved to 8720 S.E. 45th St., Mercer Island, Wash., 98040. Phone 206-232-9400.

SPSS Inc., Chicago, has purchased Vento Software, Inc., a provider of business performance management solutions. The transaction, completed November 29, 1999, was executed as a pooling f interests in which SPSS issued approximately 550,000 shares of its common stock.

Evanston, Ill.-based ad tracking firm **Market Advantage** announced that Sears, Roebuck and Co. renewed its three-year contract with the firm. Under the terms of the contract, Market Advantage will provide retail print advertising data to Sears through 2002.

Moderator MarketPlace™

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

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(See advertisement on p. 74)

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(See advertisements on pp. 52, 83)

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Fax 714-974-6968
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Mokena, IL 60448
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International Mystery Shopping

These firms conduct mystery shopping on an international basis.

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Certified Reports, Inc.
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Elrick & Lavidge
Employee Evaluations
Feedback Plus, Inc.
Green & Associates
HR and Associates, Inc.
Stanford Klapper Associates, Inc. (Puerto Rico)
Maritz Marketing Research Inc.
Market Image
Market Trends, Inc.
Marketing Network International
Marketing Solutions Corporation
Michelson & Associates, Inc.
MSB-Managing The Service Business (U.K.)
National Shopping Service Network, LLC
NOP Mystery Shopping (United Kingdom)
Oy Palvelu Plus - Service Plus Ltd (Finland)
Pinkerton Field Research Services
Second To None, Inc.
Secret ShopNET (Canada)
Sensors Quality Management, Inc. (Canada)
Service Dimensions International (Canada)
The Shadow Agency, Inc.
Shop'n Chek, Inc.
Shoppers International, Inc.
SHOPPERS, Inc.
Tenox Appraisal Systems (Canada)

National Mystery Shopping

These firms conduct mystery shopping on a nationwide basis. See also International Mystery Shopping.

United States

A Closer Look
A&M Business Services, Inc.
Absolute Service, Inc.
Action Research Group
American Public Opinion Survey &
Anonymous Insights, Inc.
Ask Arizona
BAIGlobal Inc.
Bartels Research Corp.
BestMark
Better Marketing Associates, Inc. (BMA)
The Blackstone Group
Business Evaluation Services
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Customer 1st
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Customerize, Inc.
Customer's View, Inc.
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DMS
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Eagle Research - Denver
Field Response Company
Fogerty Group, Inc.

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Galli Research Services
Genesis Group, Inc.
ICC Decision Services
IMAGES Market Research
Integrated Research Associates, Inc.
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Mystery Shoppers, Inc.
Mystery Shopping, Inc.
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National Shopping Service
The NPD Group, Inc.
OpSec Intelligence
Pat Henry Market Research, Inc.
Perceptive Market Research, Inc.
The Performance Group, Inc.
Prove of Orlando, Inc.
Quality Assessments Mystery Shoppers, Inc.
Quality Check
QualityWorks Associates
The Quest for Best Mystery Shoppers
Quick Test
Research Strategies, Inc.
Research, Inc.
Retail Diagnostics, Inc.
Schlesinger Associates, Inc.
Scholl Market Research, Inc.
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Service Critique
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Service Excellence Group, Inc.
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SPAR/Burgoyne Retail Services, Inc.
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Strategic Marketing Services
Survey Service, Inc.
The Waveland Group
WestGroup Research

Argentina

ASECOM Latin America

Canada

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The Corporate Research Group Ltd.
R.I.S. Christie - The Data Collection Co.
Telepoll Canada Inc.

Greece

Market Analysis Ltd.Canada,ACNielsen Canada

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These firms conduct mystery shopping on a regional basis. They have been organized by state for your convenience. See also National & International Mystery Shopping.

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Connections, Inc.
Graham & Associates, Inc.
New South Research

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Arizona Market Research Services ,
Maidman Field Services,

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Jordan Associates
Kiyomura-Ishimoto Associates
L.A. Research, Inc.
Opinions of Sacramento
Pacific Research Group
The Question Shop, Inc.
San Diego Surveys, Inc.
Margaret Yarbrough & Associates

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Colorado Market Research Services

Connecticut

Beta One, Inc.

Delaware

Keystone Marketing Research

Florida

A.I.M. Field Service
Advantage Business Services
Creative Product Marketing
Gulf State Research Center
Kane Field Services, Inc.
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Premack & Associates of Pinellas County, Inc.
Professional Research Group

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Beisner Research Associates
P V R, Inc.

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Marketing Advantage Research Consultants, Inc.

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Carol Max Marketing Services, Inc.

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Midwest Survey & Research

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Suburban Associates

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Q M S
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Surveys Unlimited, Inc.
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Oklahoma City Research

Rhode Island
Capture, Inc.

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Market Image Tennessee
Mellon Market Research
People Plus

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Gulf State Research Center
Hispanic Focus Unlimited
Mars Surveys of Texas
Merchandising Specialists
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Rocky Mountain Merchandising and Research
Utah Market Research Services

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Action Research

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Issues and Answers Network, Inc.
Tournade & Associates

Washington
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InGold Research Services, Inc.
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Augusta, GA
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On-line research: Real-time competitive benchmarking via the Internet – Software makers choose Web, e-mail to measure customer loyalty, satisfaction
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Satisfaction research: Something old, something new – Mail survey, in-house database help LaQuinta Inns monitor guest satisfaction

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Qualitative research: Drinking in the memories – Projective techniques help nightclub concoct nostalgia-filled cocktails for Gen X patrons

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Mystery shopping: The many uses of mystery shopping
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Names of Note

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been named Marketing Research Executive of the Year by *Research Business Report* (RBR). RBR recognized Schlegel for his outstanding contributions to the market research industry and his role in delivering innovative technologies for on-line market research. The award was presented at the opening ceremony of the Council of American Survey Research Organizations (CASRO) conference in Charleston, S.C., in November. The Marketing Research Executive of the Year is awarded annually to the market research professional who has achieved the most formidable technological and methodological advancements in the field.

SPAR Group, Inc., Tarrytown, N.Y., has appointed **Charles Cimitile** as its new chief financial officer, replacing **Cathy L. Wood.**

Boise, Idaho-based *Clearwater Research* has announced the following additions in its Boise office: **Corey Boehning** and **Cathy McDougall** have joined the staff as research analysts. Promotions at the Boise office include: **Selina Carver** to director of data collection; **Marlin Roberts** to director of operations; **Kenny Shumard**, **Erin Iverson**, **Wanda Nesser**, **Stephen Boyer**, and **Jana Pattis** to data collections helper. At the firm's Boise Human Factors office **Gretchen Hawes** has been named usability specialist and **Kim Bales** and **Riquel Carley** have joined the staff as recruiters. **Laurie Kuntz** has been promoted to Usability Specialist. **Karen Ruby** has moved from the Boise home office to the Human Factors division as a recruiter. In other company news, **Doug Lincoln** and **Mike Exinger** presented a discussion on Internet research entitled "The Real Costs and Benefits of Internet Surveys — How to Avoid or Minimize the Operational Challenges," at the Marketing Research Association's (MRA) Annual Fall Education Conference in November in San Antonio, Texas. Exinger also serves on the Technology Council for the MRA.

NFO Prognostics, Palo Alto, Calif., has named **Tina Weinfurther** president and CEO.

Mark Natarus has joined *MarketVision Research*, Cincinnati, as vice president, client services. In addition, **Christine Guillory** has been named an analyst in the firm's marketing sciences group.

Northwest Research Group, Seattle, has named **Sissie Boatman-Guillan** project manager. At the firm's Boise, Idaho, office, **Katheryn Simplot** has been named associate project manager and **Lori Sullivan** has been named communications manager.

The FutureBrand Company, a New York brand consulting firm, has named **Christopher Nurko** client services director.

Jeff Palish has been named vice president of sales at the Bala Cynwyd, Pa., office of *Research Data Design*, Portland, Ore.

Marketing Horizons, a St. Louis research firm, has named **Jim Kramer** vice president-account management.

Maritz Marketing Research, St. Louis, has named **Wally Balden** director of Internet research.

Tim Sauer has been named national marketing manager of *Quality Controlled Services*, a St. Louis research firm.

Classified Ads

Trade Talk

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as an enticement to get them to buy materials (often nothing more than a list of shopping firms) that will help them locate shopping jobs. (The MSPA offers such information free of charge on its Web site, www.mysteryshop.org.) "We've been working with postal inspectors and Better Business Bureaus across the country to find these scamsters and shut them down but they tend to move around a lot. Once we put them out of business in one city they move to another one, rent a post office box and they're back in the game. So we have to be pretty diligent in watching for them. We'll go out and buy their materials and if we can prove they are misleading consumers, the postal authorities are happy to assist us in shutting them down," Michelson says.

It's not just consumers who are being bothered. In many cases the list compilers will add companies to the mystery shopping provider rosters without their permission and subject them to a flood of phone calls and letters from prospective mystery shoppers.

Battling on another front

The MSPA has been battling on another legal front, fighting state laws requiring mystery shoppers to be licensed private investigators. "In California, with the help of a lobbying firm we were able to get a bill passed to allow mystery shopping to be conducted by people who are not licensed as private investigators as long as the evaluation is not used as the sole performance evaluation for employees. We as an organization agree wholeheartedly that you shouldn't fire someone based on one bad mystery shopping report," Michelson says.

The MSPA has also worked to forge alliances with research industry organizations, including the Marketing Research Association and the European Society for Opinion and Marketing Research (ESOMAR), Michelson says. "We're hoping that through education we create an understanding in the general research community that mystery shopping has a place in market research. We agree that mystery shopping is not always market research but it can be used as and classified as market research and it can be included in the family of market research tools."

This year the MSPA will begin compiling information for an industry survey, in conjunction with the Jim Moran Institute in the College of Business at Florida State University - Tallahassee, to determine the size of the mystery shopping business. (Michelson's best guess is that it's under $1 billion and more than $700 million.)

Shop the shoppers

Before we closed our conversation, Michelson related an anecdote showing that even mystery shopping firms aren't immune from being shopped. It seems that the client of a shopping firm wanted to test the veracity of the shopping company's reports, so the client had the shopping company send shoppers to one of its retail locations each hour during one particular day. Unbeknownst to the shopping firm, the store that day was staffed by the client's senior management, with the CEO running the cash register. The client firm set a few displays awry, tossed some litter in the bathroom, and generally set itself up for some low marks. Unfortunately for the shopping firm, the reports came back saying that everything was fine at the store. Not surprisingly, the shopping firm lost a very big account.

As the saying goes, he who lives by the sword shall die by the sword.

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Coming in February:

2000 Directory of Data Processing/Statistical Analysis/Research Software

Trade Talk

By Joseph Rydholm, QMRR editor

Mystery shopping association never rests

In conjunction with our annual mystery shopping issue, I put a call in to Mark Michelson, president of the Mystery Shopping Providers Association (MSPA), to catch up on what's going on in the mystery shopping biz. Michelson, who is also president of Michelson & Associates, an Atlanta marketing research firm, co-founded the MSPA in 1998 and has seen the industry grow quite a bit in a short time. "We have more and more companies using mystery shopping and more varieties of companies using it, everything from hospitals to e-commerce companies wanting to test the service of their Web site."

Correspondingly, the number of firms offering mystery shopping services has increased. Many marketing research firms have added mystery shopping departments or capabilities and a host of other kinds of firms now offer shopping services. "From our perspective, it's good to have research companies entering into it because they know how to use market research techniques in designing questionnaires and in reporting the findings," Michelson says. "Problems arise when you see, for example, people from the restaurant trade who decide to get into the business and they have no experience designing questionnaires and doing reports. These things tend to damage the industry because clients have a bad experience with someone who doesn't know what they're doing and they shy away from using mystery shopping because of it."

As the industry has grown, so has public awareness of the mystery shopping process, which in turn has led to a number of scams associated with the shopper recruitment process. Most are "get rich quick" cons that wildly overstate the income consumers can earn as mystery shoppers

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Non Sequitur