



QUIRK'S

Marketing Research Review

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January 2002

**The importance
of a pretest
in mystery
shopping**

**Sizing up
fast-food
restaurants**

**When mystery
shopping goes
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**Useful
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Volume XVI, Number 1

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Quirk's Marketing Research Review, (ISSN 08937451) is issued 11 times per year - Jan., Feb., Mar., Apr., May, June, July/Aug., Sep., Oct., Nov., Dec. - by Quirk Enterprises, Inc., 8030 Cedar Ave., Ste. 229, Bloomington, MN 55425. Mailing address: P.O. Box 23536, Minneapolis, MN 55423. Tel.: 952-854-5101; Fax: 952-854-8191; E-mail: info@quirks.com; Web address: www.quirks.com. Periodicals postage paid at Minneapolis, MN and additional mailing offices.

Subscription information: U.S. annual rate (11 issues) \$70; Canada and Mexico rate \$100 (U.S. funds); international rate \$119 (U.S. funds). U.S. single copy price \$10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER:** Please send change of address to QMRR, P.O. Box 23536, Minneapolis, MN 55423.

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

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Save some, spend some

Now that the gift-giving season has come to an end, American kids have a tremendous amount of money at their disposal. Will they be running out to buy the latest video game system, or will they be persuaded by their parents to put their money into college funds? According to a two-part study conducted by KidzEyes.com, an online research panel, the large majority of kids (71 percent) between the ages of 6-14 will save some of their money to buy something later. Nearly half (46 percent) of the kids reported they would spend their money right away; 28 percent said they would put



it in the bank to save for the future; 14 percent said they would give money to a charity; and 6 percent said they would let their parents decide what to do with it.

The KidzEyes.com survey of more than 1,700 kids

nationwide examined kids' relationship with money as well as their shopping and spending habits.

Kids' primary source of spending money is gifts. In fact, 80 percent of kids said they get their money from gifts. Other sources kids get money from include their parents, with 48 percent of parents giving their kids money when they need it, and working miscellaneous jobs including mowing lawns, shoveling, washing cars, and babysitting (34 percent). Fifty-eight percent of kids also get a weekly allowance which averages \$6 nationwide.

Once kids decide it's time to spend their money, it's a safe bet that they will spend some, if not most, of their

Consumers look to simplify meal prep

Nearly 80 percent of all suppers consumed in America take place at home, according to research from The NPD Group, Inc., Port Washington, N.Y. As a result, Americans are looking for ways to make meal preparation easier, according to NPD's annual Report on Eating Patterns in America.

Although the number of suppers prepared by females has declined slightly from 78 percent in 1995 to 76 percent in 2000, the job of cooking still falls mainly on the shoulders of women. Therefore, according to Harry Balzer, vice-president of NPD and author of *Eating Patterns in America*, "Mom is looking for an easier way to prepare meals and has found three key ways to do just that."



Eating Patterns in America found that the easiest way to make every meal less work is to cut back on the number of dishes served. In 2000, the average supper consisted of 3.6 dishes, the lowest number in the 16 years of the report and 8 percent smaller than 10 years ago. The side dish is the one being dropped. In 1990, 65 percent of suppers had at least one side dish, but in 2000 that number was only 56 percent. The side dishes most often eliminated are vegetables, potatoes, salads, and bread.

The second way American cooks are making easier meals is by spending less time assembling the main dish. Although there is still a main dish at supper, it is more likely to be a frozen product. The percent of suppers served with a frozen main course reached an all-time high in 2000 of 11.5 percent, up 22 percent from just five years ago.

The third way Americans are making their lives easier is by inviting fewer people over to share a meal. In 2000, the average American household served 52 meals to guests (including breakfast, lunch, supper and snacks). That is down from 94 guest meals in 1985 and 72 in 1995. As Balzer puts it, "Having guests over is more than just a meal. You have to clean the house too!"

Although Americans are interested in making meal-time easier, they are not taking meals out from restaurants. For the first time in 12 years, the number of meals purchased at a restaurant by the average American to be eaten at home dropped from 141 in 1999 to 138 in 2000. This decrease is directly related to the number of new, ready-to-cook and ready-to-eat products offered at the supermarket.

The Report on Eating Patterns in America is based on the results of over 30 research studies conducted by NPD, including the daily food and beverage consumption of 5000 Americans. The studies used for this analysis included proprietary daily food diaries, retail sales, kitchen audits, restaurant sales, food safety concerns, appliance and cookware sales, nutritional concerns and others. For more information contact Harry Balzer at 847-692-1704 or at harry_balzer@npd.com.

money on food. When asked to detail what their past three purchases were, 75 percent of kids mentioned some

sort of food. Candy was the most popular food selection, with 59 percent of
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Names of Note

Digital Research, Inc., Kennebunk, Maine, has named **Katherine Alexander** director of marketing and communications.



Alexander

Hernandez

Galloway Research Service, San Antonio, Texas, has named **Daniel Hernandez** marketing research consultant.

Doug Malcom has been named

senior analyst at Kansas City, Mo., research firm *Market Directions*.

San Diego Surveys has named **Chris Winkler** director of research.

Mediamark Research, Inc., New York, has named **Cec Serrano** account executive in the firm's Chicago office. In addition, **Jeff Tiddens** has joined the firm's Los Angeles office as account executive.

Research firm *Taylor Nelson Sofres* (TNS) has named **Sam van der Feltz** managing director of Northern and Central Europe. In addition, **Ross Broadbent** has joined the Interactive Solutions division of TNS (TNSis) as product director and **Gabriel Hughes** has joined TNSis as new product development manager. **Nigel Foote** has

been appointed managing director of TNS Tellex, a U.K.-based broadcast monitoring firm.

Susan Phillippe has been promoted to director of quantitative services at *JRA, J. Reckner Associates, Inc.*, a Montgomeryville, Pa., research firm.



Phillippe

Cramer

Atlanta-based *Polaris Marketing Research* has named **Cameron Cramer** marketing and business development manager.

In conjunction with Southfield, Mich., automotive data services firm *R.L. Polk & Co.* increasing its holding in *Marketing Systems GmbH* to 100 percent, **Leo Lucas**, Marketing Systems sales and marketing director, has been appointed managing director of the Marketing Systems Group. **Rudolf Lewandowski**, founder and former president of Marketing Systems, has been appointed chief consultant to Polk.

U.K.-based *Medical Marketing Research International Ltd.*, has named **Paul Donnelly** head of its Global Data Collection division. In addition, **Phil Howe** has been named research director.

South San Francisco, Calif.-based research firm *RHK Inc.* has named **Marc Litvinoff** chief executive officer.

Katena Markus has been named chief financial officer of Chicago-based *Research International USA, Inc.*

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New release of Survey Select

SurveyConnect, Boulder, Colo., has released Survey Select Expert 4.5, a survey tool designed to help users develop Web surveys to evaluate employee and customer opinions. This release has added 44 additional report wizards to create tables, color graphs, and reports. By using crosstab and demographic filters, survey administrators can pinpoint their areas of focus. Survey Select Expert 4.5 also includes: improved editing features to allow flexibility of survey layout (electronic or paper-based); additional survey templates, such as a 360-degree survey template; the capability to create e-mail survey instructions specific to each survey; optional passwords to protect data integrity while maintaining anonymity; and the export of raw data to Excel, Access, or any other ODBC-compliant database. For more information visit www.surveyconnect.com.

IRI enhances BehaviorScan

Information Resources, Inc., Chicago, has enhanced its BehaviorScan in-market testing service, which tracks purchases of bar-coded products. Beginning in selected markets this year, panelists now will show their ID card at participating stores and will be asked to report their purchases from non-participating retailers, including mass merchandisers and supercenters, by using a handheld scanner at home. This dual approach was chosen to minimize panelist burden while capturing as many of their purchases as possible. IRI has also completed an upgrade to the BehaviorScan Targetable TV system, part of IRI's within-market TV ad testing service. The new technology assigns every

local cable subscriber to one of three cells. IRI can deliver different TV commercials to each cell and analyze the impact of each ad plan on the purchasing behavior of the BehaviorScan panelists in each cell. For more information visit www.infores.com.

Decision Analyst builds contractor panel

Decision Analyst, Arlington, Texas, has created the Contractor Advisory Board, a new online panel of 8,500 contractors in the U.S. and Canada. All types of contractors (general contractors, HVAC/R, electrical, tile and masonry, plumbing, landscape, etc.) are members. During registration, panel members are asked to provide information such as business size, services provided, type of market served, market segments served, title and/or position, union affiliation, and business sales level. For more information contact Jerry Thomas at 817-640-6166 or visit www.decisionanalyst.com.

Batch map product from Spatial Insights

Vienna, Va., software firm Spatial Insights, Inc. released Map-O-Matic, an application developed for batch map production within the MapInfoProfessional environment. Map-O-Matic starts with an existing MapInfo workspace, allowing the user to have control over the map content and styles. It cycles through any or all specified objects in a table, and zooms to each of the selected objects. Unique map titles are automatically generated using text from a specified column, and scale bars and north arrows can be added to each map. The maps can be printed, or saved to a number of graphics formats, including PDF, WMF, JPG, or BMP. Individual MapInfo workspaces can be saved for each of the

maps produced, to facilitate fine-tuning at a later time if desired. For more information visit www.spatialinsights.com/software/plugins/mapinfo/mapomatic/.

Tech industry resource launches

Port Washington, N.Y., research firm NPD INTELECT has launched NPDTechworld, a market information resource for the technology industry. NPDTechworld is an online market information service that combines consumer electronics and information technology market information collected at the point-of-sale and from consumers. By combining point-of-sale information, previously provided by NPD INTELECT Market Tracking, with consumer information collected from NPD's Online Panel, NPDTechworld aims to provide a representative view of market trends across all consumer segments and all channels of distribution. After the service's official rollout, new features will be added to allow clients to customize data to address the particular business issues of each user, facilitating access to the information most relevant to their needs. For more information visit www.npd.com.

Qual/quant tool examines buying process

MarketBridge, a Bethesda, Md., professional services firm, is now offering Channel Preference Mapping, a new research service designed to help clients understand how, when, and where customers want to buy their products and services. Channel Preference Mapping uses both qualitative and quantitative approaches to examine customer

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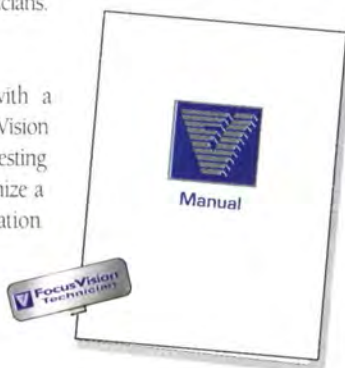
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News notes

Rochester, N.Y., research firm **Harris Interactive** has reduced its staff as part of its ongoing integration process with **Total Research**. The actions affected approximately 5 percent of the full-time workforce in Rochester; New York City; Norwalk, Conn.; Princeton, N.J., and other outlying locations. The affected employees were mainly support staff with overlapping functions in the combined company. Harris Interactive also closed telephone centers in Tampa, Fla., and

Youngstown, Ohio. The company continues to maintain phone centers in Rochester and in the U.K.

Separately, Harris Interactive has been awarded a broad business method patent (U.S. Patent No. 6,311,190) for an online instant polling process and other techniques used for conducting multi-lingual surveys via the Internet. The patent covers the following system for conducting surveys over a network, including the Internet, to multiple respondents in multiple countries in different languages having the features

of: generating surveys from information stored in a database of the system; immediately showing the results of the surveys and offering a comparison of the results; allowing the respondent to vote only once on each survey.

Sorensen Associates Inc., a Portland, Ore., market research firm, has earned the Quality Certification ISO 9001:2000. Conformance to the ISO international quality standards is implemented through accrediting agencies that conduct a detailed audit of the entire process relating to the systems and procedures which have a direct result on a company's end-product. Sorensen Associates received the ISO 9001 Certification through a registration audit by Perry Johnson Registrars.

Southfield, Mich., automotive data services firm **R. L. Polk & Co.** has increased its shareholding in **Marketing Systems GmbH** to 100 percent. Marketing Systems, a Germany-based automotive information and research firm, will continue to trade under its own name and represent its own as well as the global Polk brands.

Acquisitions

U.K.-based research firm **Taylor Nelson Sofres** has agreed to acquire the business and assets of **Theatrical Entertainment Services, Inc.** and its sister company **RapidChek Reporting, Inc.** (together TES), a U.S. supplier of box office verification and cinema tracking services to the film industry and cinema operators. The initial cash payment is £25.9 million (US\$36.8 million). TES sales for the year ended December 31 were US\$9.9 million with EBIT of US\$5.3 million. Net assets at that date were US\$1.1 million.

Dependent upon the achievement of earnings performance targets, relating to the ongoing performance of the U.S.



The European Society for Opinion and Marketing Research (ESOMAR) will hold Net Effects, its annual Internet conference and exhibition, on February 3-5 in Berlin. For more information visit www.esomar.nl.

The Institute for International Research (IIR) will hold a conference on ethnographic/observational market research on February 4-5 at the Hyatt Pier 66 in Fort Lauderdale, Fla. For more information visit www.iir.com.

Map India 2002, the fifth annual international conference and exhibition on GIS/GPS and remote sensing, will be held on February 6-8 in New Delhi, India. For more information contact Swati Grover, Map India 2002 secretariat, at swati.grover@csdms.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its annual health care conference on February 17-19 in Miami. For more information visit www.esomar.nl.

The European Society for Opinion and Marketing Research (ESOMAR)

will hold its annual automotive conference on March 4-6 in Lausanne, Switzerland. For more information visit www.esomar.nl.

Tragon Corporation will hold a workshop titled "Gaining a Competitive Advantage Through Sensory Evaluation" on March 4-6 at the Sheraton Palo Alto, Palo Alto, Calif. For more information visit www.tragon.com.

Frost & Sullivan will hold its annual advanced marketing research executive summit on March 10-14 at the Sheraton World Resort, Orlando, Fla. For more information visit www.frost.com.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on CRM/data mining on March 17-19 in Prague. For more information visit www.esomar.nl.

Britain's Market Research Society will hold its annual conference on March 20-22 at the Hilton Brighton Metropole, Brighton, England. For more information visit www.mrs.org.uk.

business and geographic expansion, deferred cash payments may be made in the years from 2002 to 2007. The maximum consideration payable, including the initial cash payment, will not exceed £52.0 million. Completion, which is dependent upon obtaining Hart Scott Rodino approval, was expected to come within weeks of the deal's announcement in November.

TES will operate as a division of Taylor Nelson Sofres' CMR, a provider of strategic advertising tracking services in the U.S. The current owner and CEO, Thomas Steven Perakos, who founded the company, will continue to run it and will take responsibility for expanding its operations worldwide. Other key management will also remain with the business.

Alliances/strategic partnerships

New York research firm **RoperASW** has become a certified QualPartner, which means the firm is proficient in and licensed to use the online qualitative software from Castle

Rock, Colo.-based **QualTalk**. RoperASW plans to use the augmented capabilities both for custom qualitative work for clients and multi-client studies, including special research for Roper Reports, the company's trend-spotting service. RoperASW plans to use the bulletin board technique as part of its TrendWhys qualitative studies of changing consumer trends.

Boston-based **Bennett Research Services Inc.** has announced that the Business Research and Consulting Group of **Abt Associates Inc.**, a Cambridge, Mass., research firm, has made a strategic commitment to use and integrate Bennett's data collection and online monitoring and publishing services in its marketing research operations. To showcase their combined capabilities, Bennett Research and Abt Associates are collaborating on a national survey that will examine how American households are reacting financially to the enduring economic uncertainty that has been compounded by the ongoing U.S.-led global war on

terrorism.

Wilton, Conn., research firm **Greenfield Online** has entered into a strategic alliance with **Microsoft Corporation** which grants Greenfield Online the ability to recruit visitors to Microsoft's MSN Web sites for marketing research purposes. Site visitors can choose to participate and are screened at the time of survey execution. Eligible participants are then directed to open surveys based on Greenfield Online's proprietary quota management system.

Separately, Greenfield Online has entered into a multi-year agreement with Minneapolis-based **GfK Custom Research Inc.** under which Greenfield Online will assist GfK Custom Research's online research efforts.

Autometrics, an automotive e-commerce performance measurement firm, has teamed with **Nielsen/NetRatings** to provide the automotive industry with Internet audience information

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War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: War Stories is a semi-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.

Sometimes moderators can make things so interesting for clients observing focus groups that the clients do strange and destructive things.

During one group, moderator Joel Reish was waiting for respondents to finish a projective sentence completion when there was a tremendous noise behind him, where the mirror was located. Reish instinctively raised his arms to protect his head, then looked back to notice the mirror shaking.

He politely excused himself and retreated to the back room, where his client, sitting on the floor, sheepishly reported what had happened. The rotund gentleman was so anxious to see what one particular respondent had written that he couldn't wait for Reish to ask the consumers to read their answers. So, in an attempt to get close enough to read the response, he climbed up on the ledge just behind the mirror. CRASH! No more ledge.

Reish reports this was the first time in his career that the expense account he submitted included anything like a carpentry bill for \$1,200.

By the way, there is a market research myth, possibly equivalent to an urban myth, that a client once actually fell through the mirror. Can anyone out there substantiate this? Did it really happen at least once?

Ellen Gregory of Marketing Research Services cites a study she was involved with where, at the end of a 16-week home-use test, respondents were asked to return a scale they'd been given to weigh the test product. One of Gregory's employees called a respondent to inquire why she hadn't kept her scheduled appointment that morning to return the scale. The woman explained that the police were in her home at that very moment, and since both she and her husband were being arrested, she would not be keeping the appointment — at which point Gregory's dedicated employee asked if she could meet her outside the jail and retrieve the scale. The respondent considered the offer, but declined.

Gregory also recalls a project where she herself was conducting the final visit of a door-to-door study involving a home-use test. Late in the afternoon she was greeted at the door by a visibly embarrassed woman whose hair was a mess and whose clothes were wrinkled. She apologized for her appearance, but asked Gregory in to do the interview.

Toward the end of the interview Gregory needed to observe the storage


of the product, so the woman led her to the bathroom, where the product was located. They had to travel through the bedroom, where a young man, hair messed, sat in bed, under the covers. Gregory could tell the man was not wearing a shirt. She couldn't tell what else he wasn't wearing.

The woman did not introduce the man as her husband.

Gregory quickly asked the rest of her questions, then scrambled out of there. (Market researchers are so considerate of other people's needs!) That was the last time Gregory agreed to do a door-to-door project.

That woman at least was embarrassed about what she had been doing. Not so the woman remembered by Pat Sabena of Patricia Sabena Qualitative Research Services. In a focus group session about contraceptives, Sabena's young respondent gleefully revealed that she wore different hair ribbons to match the different bed sheets for her different lovers.

Sabena did not probe further into that response.

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 e-mail me at artshulman@aol.com. 

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Qualitatively Speaking

Qualitatively Speaking is a regular column in which a revolving cast of authors offers their thoughts on various aspects of the multifaceted world of qualitative research — in 1,000 words or less! Submissions are welcome. Send your ideas or manuscripts to Quirk's Editor Joe Rydholm at joe@quirks.com.

Are you leveraging the expertise of your focus group moderator?

By Tom Greenbaum

Editor's note: Tom Greenbaum is president of Groups Plus, a Wilton, Conn., research firm. He can be reached at 203-834-1126 or at tlg@groupsplus.com.

Consider this: You are about to undergo a dental procedure and the dentist indicates that you need to have a crown due to the decay that has eaten away at your tooth. You disagree with the dentist and tell him to do an inlay because that's what you've had in the past and it's worked well for you.

Or you hire a caterer for a party and they provide you with a suggested list of menu items. In reviewing their recommendations, you think about a recent party you attended where they served a wonderful dish, but it does not appear on the caterer's list. You ask the caterer about this and they indicate it is not an item they normally recommend, as they haven't had good responses to it in the past. You decide to have this dish anyway as it

was so tasty at the other party.

In both of the above situations, you have contracted with a specialist who has experience and expertise in a specific area. It is assumed that you went to the individual because of their capabilities, and you are anticipating a positive outcome from your involvement with them. However, in both situations you chose to ignore their professional recommendations based on your own prior experience. The chances are that you will be proven wrong in the end, and this will not serve to foster a good future relationship with either the dentist or the caterer.

Many companies do the same thing when working with moderators in planning qualitative research projects. The organization often will go to great pains to find the best moderator for their organization, using RFPs, Web inquiries, personal interviews, and recommendations from peers to ensure that they make the best decision. Then when the actual project is conceptualized, the

client contact is unwilling to accept the recommendations of the research professional relative to the overall methodology, the approach, or the content flow. This often places the moderator in a very difficult situation, as he or she can be "forced" to conduct research in a way that is less than optimal. The moderator is left with two choices: either resign from the assignment or conduct a study that he or she feels will be substandard. The end result of this exercise could easily be a disappointing outcome and a damaged client-moderator relationship. It's a lose-lose for everyone.

What then, can client organizations do to avoid compromising their own needs and giving in to recommendations of the research professional that they feel are not in the best interest of the project?

First, it is essential that the client company carefully research the person/organization hired to conduct the research, to ensure that the sup-

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When mystery shopping goes bad

By Peter Gurney



Follow these guidelines to avoid
an unsuccessful shopping program

Editor's note: Peter Gurney is managing director of Kinesis, a Seattle customer experience management firm. He can be reached at pgurney@kinesis-cem.com.

Myystery shopping seems like such a good idea: send people into stores to observe service and report what they see, then use the observations to reward managers, coach employees, track improvements, and compare service levels across the company.

Why, then, are so many managers tearing their hair out in frustration over their companies' mystery shopping programs? Despite the fact that many businesses spend thousands of dollars annually on such research, an astonishing number of mystery shopping programs fail outright or limp along year after year, perennially under-performing against expectations.

Companies recite a litany of complaints, including:

- disputed findings by employees and managers;
- questioning of mystery shoppers' skills and credibility;
- more internal administration than planned;
- flat trend lines and undifferentiated scores;
- little or no correlation between mystery shopping results and customer satisfaction ratings;
- lack of timeliness and responsiveness from mystery shopping vendors; and,
- difficulty demonstrating return on investment.

There is nothing inherently faulty about the mystery shopping methodology, which is simply a type of observational research. It can and does provide tremendous value when it is designed and executed well.

So who is responsible for the fact that so many mystery shopping programs go bad?

Let's examine the suspects:

The industry. Despite the fact that it has been around for at least 60 years, the mystery shopping industry is still immature. It's highly fragmented with many small regional or specialty firms and relatively few large national players. There are as yet no generally accepted procedures for the selection, training, or certification of mystery shoppers, nor are there clear standards of quality control. As a result, the reliability of the data collected is sometimes questionable. Data quality may vary considerably, not only from vendor to vendor, but also from shopper to shopper within a single study. When employees who have been mystery shopped dispute the results (as they inevitably will, particularly when the data are linked to incentives) it can be difficult to argue that the mystery shoppers know what they are doing.

This situation appears to be changing. A trade group called the Mystery Shopping Providers Association (MSPA) has been formed, with the express goal of "instilling confidence in the business community that mystery shopping is performed in a professional and fair manner." The MSPA holds conferences twice a year and provides information and resources for mystery shopping vendors and users.

An equally promising development is that independent mystery shoppers have begun to organize and police themselves, using online chat rooms and Web sites as their communication channel. Dozens of local and regional mystery shopping groups have been formed in the past few years. Members of these loose-knit organizations share experiences, discuss techniques and compare the practices of the mystery shopping vendors they work with. Some groups go so far as to rate vendors and even blackball companies that are slow to pay or exhibit questionable ethics. In effect, a grassroots guild of mystery shoppers is developing

through the medium of the Internet, creating standards and practices that the industry has heretofore failed to provide.

The vendors. Mystery shopping is a highly labor-intensive activity, and the vendors who supply this service typically possess considerable logistical acumen. Their skills lie in the hiring, sched-

There are as yet no generally accepted procedures for the selection, training, or certification of mystery shoppers, nor are there clear standards of quality control.

uling, deployment, and management of a distributed workforce. Unfortunately, they're typically less sophisticated when it comes to other important factors necessary to the success of mystery shopping programs, such as research design and analysis, development of enterprise-wide service initiatives, integration of data across methodologies,

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Is quick service good service?

Customer satisfaction and mystery shopping team up to size up the fast-food industry

By Rachael Narsh

Editor's note: Rachael Narsh is a freelance writer based in St. Louis.

Myystery shopping research has long been used at the retail outlet level to monitor operating standards set at the corporate level. But in an era where the customer is king — and always right — such a tactical approach to performance measurement fails to account for the unwritten standards of the customer. What does the customer consider to be important to the experience? And what does the customer actually experience?

This is what sparked the idea behind St. Louis-based Maritz Research's recent research endeavor involving the quick-service (or fast-

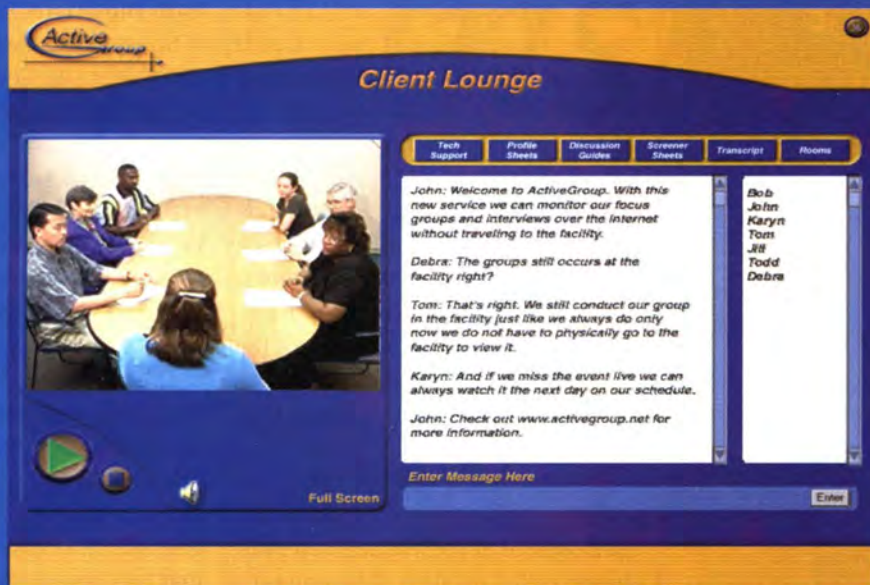
food) restaurant (QSR) industry. While it's good to know if a company's stores and employees are performing up to company standards, it's even better to know if they are living up to the standards of those that keep them in business.

Organizations often commission customer satisfaction and mystery shopping research studies separately. While each methodology can stand on its own, Maritz believed that the two could be greatly strengthened when used in tandem, providing a more rounded approach. "To prove it, we combined the two methodologies to take a closer look at the fast-food industry," says Al Goldsmith, vice president of Maritz's Virtual Customers division. "We chose this

particular industry because it really lends itself to this type of research. There are so many outlets and so many standards and brand attributes that are heavily advertised. The fast-food industry also has many measurable attributes that other service industries just don't have."

For the customer satisfaction portion, Maritz first conducted a Maritz Poll of consumers on QSRs to find out customer expectations and what's important to them when they dine at a fast-food restaurant. Virtual Customers followed this up with a Maritz Shop, or mystery shop, to the top fast-food chains to see what people actually experience. By comparing the results of the two, Maritz believed it could determine if people

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do indeed get what they want when they visit a fast-food establishment.

Cooking up the study

For the first part of the project, a phone interview questionnaire was developed based on input from current and past Virtual Customers programs. Approximately 800 QSR customers (those who had patronized a QSR establishment at least once in the past month), roughly 400 men and 400 women, across the country were randomly called and interviewed about their expectations when they go to a fast-food restaurant. Interview questions covered a list of attributes that vary in importance to the interviewee, including cleanliness of the facility, professionalism of the employees, quality of the food, and speed of service.

The feedback from the telephone portion was then used to drive the development of the Maritz Shop evaluation, or the mystery shopping portion of the research, in which approximately 400 customer visits were paid to the nation's top 10 fast-food restaurants to compare expectations to the actual experiences. The shoppers were asked to evaluate interior and exterior cleanliness, customer service, and food quality, among other things. Separate questions were created for drive-thru shops.

The sample was based on the recent *Restaurant Review* market share rankings. The top 10 market share ranking leaders in the U.S. were selected to be shopped, meaning that if McDonald's owns 50 percent of the market share, 50 percent of the mystery shopping sample was randomly selected McDonald's restaurants. The restaurants shopped were McDonald's, Burger King, Wendy's, Taco Bell, KFC, Subway, Arby's, Dairy Queen, Hardee's, and Jack in the Box. (Though specific restaurant franchises were selected for the study, the results were not intended to be restaurant-specific.)

The shops were distributed among the three primary day parts for fast-food service (breakfast: 6-9 a.m.,

lunch: 11 a.m.-2 p.m., and dinner: 4-7 p.m.), and included both dine-in and drive-thru shops. These shop rotations were selected from data collected in the telephone portion of the study.

Would you like a clean restroom with those fries?

So what did the research uncover? The Maritz Poll found that 80 percent of Americans rate interior cleanliness their No. 1 consideration when it comes to selecting a fast-food restaurant. This was followed closely by food quality (79 percent). Order accuracy and cleanliness of the restroom were also big concerns to 75 percent of respondents.

"Fast-food industry executives were surprised to find out that interior cleanliness was the absolute top concern for their patrons," says Goldsmith. "We would have never guessed it would be No. 1. This is just one great example of what dual methodologies will uncover.

"Knowing what is important to measure going into the research makes the mystery shopping much more worthwhile," Goldsmith says. "Based on our results, we now know to track that attribute more thoroughly in future store visits."

Low-scoring motivators included value/combo meals (27 percent) and children's play areas (17 percent). And despite millions of dollars spent on promotional giveaways, games and special signage, only 11 percent of those surveyed claims to really care about them.

"Apparently the money being spent to advertise and market promotional giveaways and games is not having the intended impact on retention or customer satisfaction," says Goldsmith. "The basic conclusion we can draw from these results is mop the floors, keep the tables and restrooms clean, and deliver a quality product, and customers will gladly come back."

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suggested, it seems that customers really are having it their way when visiting a QSR. The Maritz Shop results found that fast-food restaurants are indeed meeting the expectations of Americans who desire cleanliness, good service, and quality food. Eighty-six percent of shoppers reported that the tables were clean and free of spills and trash. The restrooms were clean and in working order, according to 83 percent of evaluators. Orders were filled correctly in 96 percent of the visits, while 92 percent reported that the food met their expectations.

"Our Virtual Customers ratings go against some of the common perceptions of fast-food restaurants," Goldsmith says. "The quick-service restaurants appear to be delivering on their promises. However, there's certainly room for improvement. It's worth noting that 14 percent of the restaurants shopped did not have clean tables. To a large fast-food franchise, this could mean that thousands of their outlets are failing in this category, and therefore not living up to customer expectations. Because this is so important to customers, revisiting the establishments in six months and developing ongoing measurement systems would be beneficial."

Need a combo deal for your research appetite?

On its own, mystery shopping is a great operations tool. But when paired with customer satisfaction research, it becomes an even better performance improvement tool. Knowing what's happening in the outlets, along with what's important to customers, gives restaurant managers the ability to drive performance improvement in those areas that really matter to the customers. This, in turn, helps to determine the order of priorities when it comes time to make improvements. Investments can be targeted to those areas that will have the biggest impact on the likelihood of the customer to return, driving improvements right through to the bottom line. 



The importance of a pretest in mystery shopping

By Peter Thorwarth

Editor's note: Peter Thorwarth is president of BMA Mystery Shopping, Phoenixville, Pa. He can be reached at 800-355-5040.

When the client says...
“Good news – the mystery shopping program has just been approved and now people here are very excited about seeing results as soon as possible. How soon can you have the shoppers in the stores? Can it start full-force on Monday?”

...what should you do? Jump ahead and get the mystery shopping in the field right away? Or strongly recommend a brief delay, in order to test and fine-tune the survey form, guidelines, scenarios and Internet online elements?

Firms like ours have faced this temptation time and again: a full-service or field-service client has a draft of a mystery shopping form that looks right to the people there and they want to start a large mystery shopping project right away. It would be easy to give in and throw it out in the field. But it's really not in anyone's best interest to do so. We know from hard-won experience that we shouldn't mystery shop hundreds or thousands of locations without first testing the form.

One key reason to do a pretest is expressed well by Bill Green of Shoppers Critique International: “Mystery shopping providers rely in many cases on the information our clients divulge with respect to the nature of their business and method of operations. Many times, the client [unintentionally] does not provide details that are critical to us and unfortunately we may not find out until the program is underway.”

A related reason is that the mystery shopping experience may not flow as expected. As a result, some questions on the survey form may need “N/A (not applicable).” Looking at



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selling/retail situations, for example, we've learned that some clients assume that salespeople in their stores will at least follow the general training guidelines. The truth we discover, thanks to the pretest, is that some sales associates make almost no effort at all to assist customers, even those who seem very interested.

Associates like that make it impossible for the mystery shopper to answer some of the questions. Faced with that situation, individual mystery shoppers nationwide would have been stumped and calling our 800-number for instructions.

I'm sure the same is true in restaurants, hotels, banks, and other mystery shopping venues: testing and correcting the form in advance prevents headaches and delays.

How to conduct a pretest

A pretest is a very simple endeavor. In essence, it is just sending top-level shoppers to actual stores in order to act out the scenarios, follow the guidelines, and fill out the forms (paper forms and, where applicable, online forms). After that, debrief the pretest shoppers and review their results. Use those findings to improve (or at least fine-tune) the scenarios, guidelines, and form.

Simple though it may be, a pretest can make the difference between 1) a research project that is successful and 2) a haphazard comedy that frustrates everyone and has few actionable results. It requires a small effort and it pays significant dividends.

Pretest elements

First, consider the survey instrument, i.e., the mystery shopping form. Is there anything wrong with any of the following questions?

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- "Was the sales associate friendly and helpful?"
- "Did you see (manufacturer name) rebate forms?"
- "Was the video display showing the demo tape?"

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- Nichols Research, Inc.-GroupNet

CALIFORNIA (Southern)

Los Angeles:

- Adept Consumer Testing Inc.-GroupNet-Beverly Hills
- Adept Consumer Testing Inc.-GroupNet-Encino
- Adler-Weiner Research-Westwood
- Schlesinger Associates
- Trotta Associates Marina Del Rey
- LA. Orange County:
- Fieldwork Los Angeles
- San Diego:
- Luth Research
- Taylor Research

COLORADO

Denver:

- Fieldwork Denver

CONNECTICUT

Stamford:

- Focus First America

FLORIDA

Miami:

- National Opinion Research Services
- Orlando:
- Schlesinger Associates

GEORGIA

Atlanta:

- Fieldwork Atlanta
- Jackson Associates-GroupNet
- Schlesinger Associates
- T & K Research Centers

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- National Data Research, Inc.-GroupNet
- Smith Research
- Chicago-Suburban:
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- Raleigh:
- L & E Research

OHIO

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- Focus Groups of Cleveland

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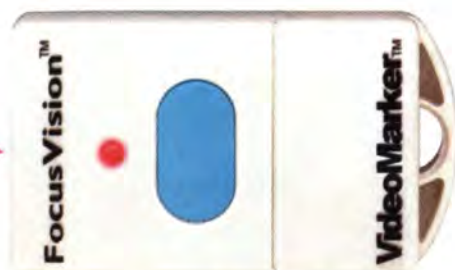
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• “How many tires were missing from the display wall?”

Yes, it turns out they were all flawed.

1) During the pretest, some sales associates were wearing nametags that were not meeting the client’s needs, because they were under aprons or sweaters and could barely be seen.

Solution: “Were all associates wearing nametags that were plainly visible?”

2) During the pretest some sales associates we encountered were friendly but not helpful.

Solution: We made it into two questions – “Was the sales associate friendly?” “Was the sales associate helpful?”

3) During the pretest, expired rebate forms were found in some stores, which would have given the client a “false positive.”

Solution: “Did you see (manufacturer name) rebate forms that were current/not expired?”

4) During the pretest some stores had no video display at all.

Solution: Again, we volunteered that two questions would better serve the client: “Was there an operating video display? If yes, was it showing the demo tape?”

5) During the pretest, it was noted that some stores also had tires on displays on columns and on freestanding units, in addition to the display wall. In some cases, those displays were missing tires.

Solution: “How many tires were missing from the display wall or other tire displays?”

The most common improvement, as noted above, is to take one question and break it into two separate questions. Every question on every form should be examined and tested to see if this would improve the accuracy of the data gathering.

Second, consider who should actually go to the stores to perform the pretest. We recommend using two or three very experienced mystery

shoppers from diverse parts of the country. A New York shopper might spot something that won’t flow as expected in the New York stores, while a Mississippi shopper might spot something that doesn’t apply to small-town stores.

The pretest shoppers should only be given the training materials, guidelines, and survey form, without extra background information. They should be no more informed about this particular survey than the average shopper would be, using the materials provided. As part of the debriefing, the pretest shoppers should be encouraged to point out anything they feel is confusing or insufficiently specific. Preventing misunderstandings is an important key to a successful mystery shopping program.

Third, have the pretest shoppers use the actual systems that the rest of the shoppers will use to deliver the results data to the mystery shopping provider. If the shoppers will send

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the results via a Web site, for example, have the pretest shoppers use and critique that Web site.

Fourth, test the methods by which you will deliver the results to the client. This is not an issue if you will be delivering the data in Excel or on paper, but it matters a great deal if the client will be accessing results online.

Rob Schneider, president of Archon Development, a firm which provides online services for mystery shopping companies, says, "From an online technical standpoint, pretests give you tremendous advantages and resolve important questions." Such as:

1. Is the end-client behind any firewalls or proxy servers that need to be addressed prior to launch?

2. Is the end-client using an ISP or operating system that isn't fully supported by your online system and needs to be?

3. Are all end-user logins, triggers, and other capabilities fully functional prior to mass use?

4. Is all form scoring and report scoring perfect?

5. Has the end-client given all of the correct information relating to locations (i.e., zip codes, names of locations, management hierarchy, etc.)

"The biggest benefit and reason for conducting a pretest from a technical view is simple," Schneider says. "If you first test a handful of users within a company, you will find that the majority of technical questions and problems can and will be addressed prior to thousands of users having those same questions and problems with a full-blown project launch."

Accept the importance?


Will clients around the world accept the importance of a pretest? For everyone's sake, we hope they do. Showing them this article might help them see the light. Bill Green points out the economic benefits: "It is more cost-effective to start the program right the first time than to make

modifications to programming, guidelines, and forms after the fact, which certainly permits shopping companies to provide lower-cost programs."

Non-U.S. clients will benefit just as much from taking the time to allow a pretest, says Per Bjorkman of Retail Services in Stockholm, Sweden. "We always include a pretest in our offerings/quotations, to avoid any misunderstanding and to

improve the results of the mystery shopping for our clients. Most clients accept the idea of pretest when we explain why. We are currently mystery shopping the public transport system in Stockholm [all subway trains, other trains, and buses plus three stations]. The client agreed to do a pretest, after some convincing, and now the whole project is now working 99 percent perfectly." [E]

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Mystery shopping is more than you think it is

By Chris Causey



Editor's note: Chris Causey is the sales manager at TrendSource, a San Diego mystery shopping firm. He can be reached at 619-239-2415 ext. 104 or at marketing@trendsource.com.

When consumers and corporate leaders envision mystery shopping, they often picture a wig-wearing woman in sunglasses, suspiciously circling the discount rack in an attempt to observe the front lines of a business operation. Actually, nothing could be further from the truth.

Today, mystery shopping is a leading industry in its own right, giving companies, consumer groups, and government watchdogs vital tools to ensure

that an organization operates as it should. Whether a shopper weighs and measures food products, examines the cleanliness and maintenance of facilities, or notes the cheery grins and knowledge of employees, mystery shopping provides one of the most valuable — yet difficult to obtain — commodities in business: unvarnished, accurate information.

Unknown to many business leaders, however, is the expanding role of mystery shopping. Shoppers and retail experts are playing an increasingly important role in helping companies deliver better products, more accurately serve consumers, and rate the street-level appeal of their companies and

their products.

Mystery shopping is not just a business tool for the rich. It's used every day by companies of all sizes, and can help firms from the corner grocery to the billion-dollar retailer achieve their goals. Where once mystery shopping told companies what they were doing wrong, today it is telling them what they are doing right and wrong — and offering suggestions to make their operation better.

Here's a look at some of the effective products mystery shoppers can provide.

Rewards and recognition

Simply put, so-called "reward and recognition" programs charge mystery



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shoppers on the front lines with testing employees to ensure they are doing things right. Also called an awards-incentive program, in this undercover role, a mystery shopper examines specific aspects of a customer service or salesperson's role in the customer transaction. Then, the information is compiled, analyzed and presented to business leaders. Either immediately on the spot or at a later date, employees are rewarded for doing what is an often-thankless task: doing their job right. Businesses and employees can benefit by using this service to fine-tune their operations and to support employees who work hard day in and day out.

Typically, rewards distributed to effective employees run the gamut from cash handouts to various prizes, from cars to sporting event tickets — nearly any incentive that can both pique an employee's attention and motivate their colleagues. This corporate practice is not new, but this method of implementation is. Companies up and down the Fortune 500 offer various incentives to employees. Mystery shopping now pro-

vides an objective and efficient means for determining the recipients.

Minding Ma Bell

Technology has revolutionized our lives — and at the same time given us the dreaded automated answering service. These systems help companies save money on telephone customer service staff but they can also frustrate and alienate consumers.

As companies increase centralized operations and decrease once-popular field branches, more and more calls from consumers are routed to central hubs. Rooms full of operators juggle dozens, sometimes even hundreds of calls per day. Companies must then evaluate the quality, consistency, and effectiveness of these operations knowing that every dollar counts, and every poor quality call may lead to a disappointed customer.

Providing objective quality control of calls is a key role of the mystery shopping industry and a role best often played by an outside firm. No employee wants to know that one of their own

colleagues is playing Big Brother by monitoring their every move. Outsourcing this service typically decreases costs and internal resource usage, while objectively reviewing the basics of the customer-employee encounter.

Industry-wide studies

Competition within many industries is fiercer than ever, especially in areas where technology firms, new manufacturing, and professional services remain strong. Determining a company's role among the masses is a vital step for most corporations. Unbeknownst to many, mystery shopping is not just about retail. Many firms in our industry provide economic analysis, industry services, and studies on a variety of issues. Small businesses daunted by the high-dollar consulting fees from traditional firms would be wise to examine the options available from mystery shopping firms.

Analyzing a market can produce clear results on a host of topics including pricing, performance, product vari-

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Merchandising verification

Bar codes, magnetic tags, wireless door monitors and simple pen-and-pad inventory give sellers and suppliers an accurate view of what sells and what doesn't. Even with this high technology, many companies still do not have vital information about their products that sell, such as to whom they are sold, and was the product sold with the "help or encouragement" of the sales staff?

Sales pros will tell you: most customers want to buy — if they didn't, they wouldn't be in the store. Sadly, retail professionals need to hone and practice their skills daily, just like ath-


letes and actors. Mystery shoppers are often employed to monitor not just the type of product sold, but the circumstances — weather, display tactics, appearance of product, positioning, staff presentation — which often dictate the likelihood of a sale as much as quality and price. Mystery shoppers help retailers and manufacturers alike in determining what strategies can best help them improve sales, expand market share or alter product and display appearance. Shoppers are professional shoppers not just because they enjoy the job, but because they know what to look for as savvy marketers and smart consumers.

Marketing verification

Mystery shoppers examine not just the point-of-sale criteria used by a shopper, but also the marketing influences that shaped their decision. Were advertisements strategically placed near stores? Were appropriate marketing materials available as promised? Were services in the marketing arena delivered as contracted? All of these

questions and more are the lifeblood of the modern mystery shopper. Companies positioning themselves in a new marketplace or with a new product have shareholders and principals that demand accurate line-by-line accounting of their hard-earned finances. Mystery shopping arms companies with accurate information and data to help them monitor expenses and services to help meet their goals.

Solid plan

In the past, mystery shopping was a niche industry, serving mainly retail clients at the point of sale. And while that service remains the bread-and-butter of our industry, mystery shoppers today provide vital market analysis, product testing, and consulting on a wide array of services and relationships. The savvy businessperson will not expand her firm without a solid marketing plan — and today, she would not move forward without a similar plan (and a team) provided by a reputable mystery shopping firm. 

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Editor's note: John Swinburn is the president of the Mystery Shopping Providers Association. He can be reached at 972-406-1104 or at info@mysteryshop.org.

A sluggish economy, widespread layoffs, and other significant factors have laid the foundation for a weak economic year. Companies are looking for efficient ways to obtain information, decrease travel costs, analyze competitors and fine-tune their business operations.

Solving these problems is the job of the mystery shopping industry. Sadly, many companies — particularly smaller companies — are not aware of how mystery shopping can benefit

them, and how in the midst of a sluggish economy, they can use mystery shoppers to help their companies thrive.

Below are three scenarios we have experienced in recent weeks that give executives at all levels a firsthand account of how mystery shopping can benefit a company, and help them thrive in lean times.

Flight anxiety

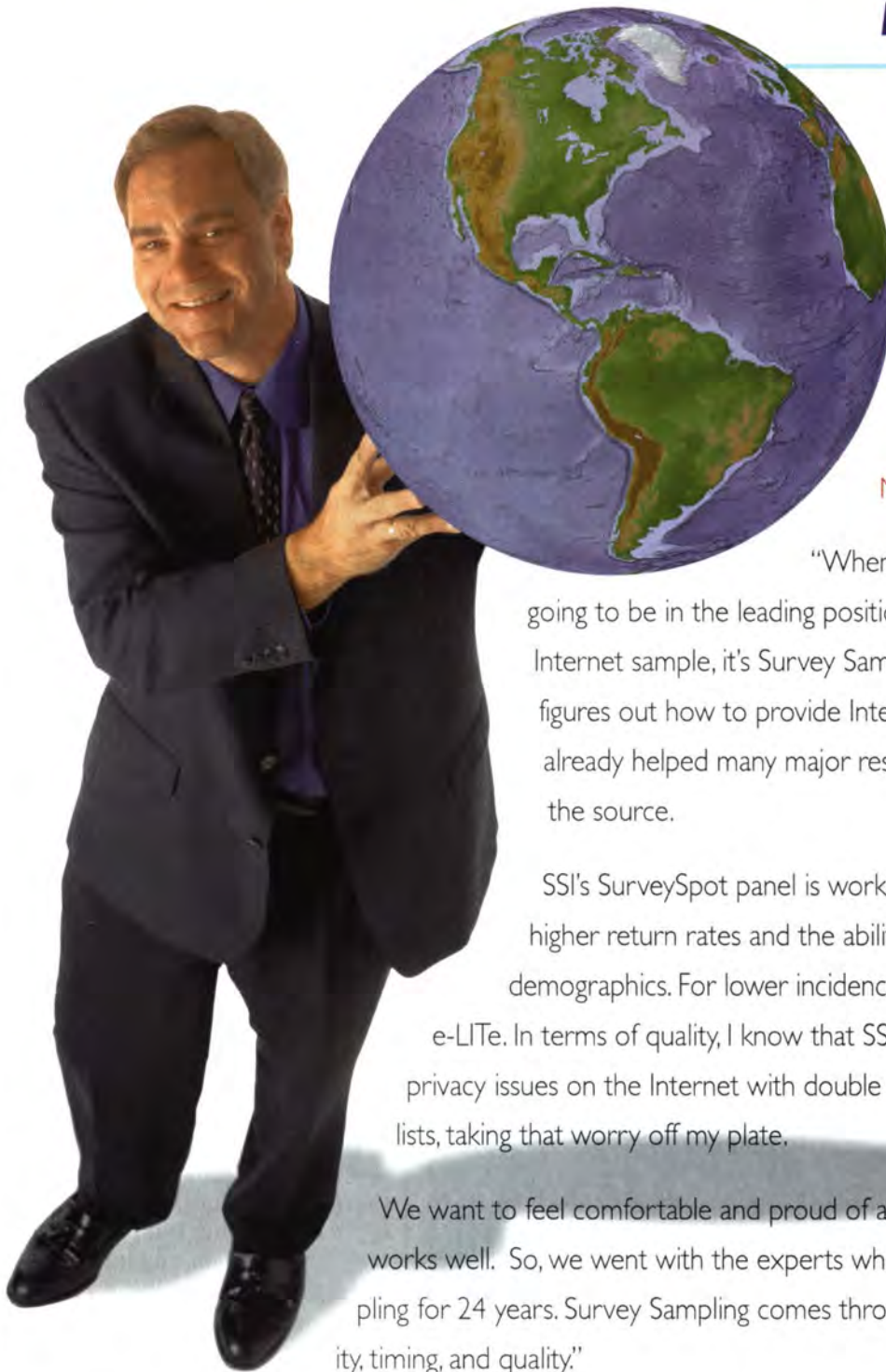
Thousands of Americans, from top-level executives on down to families separated by great distances, have expressed a concern about flying. While tough for the airlines, it's even more difficult for businesses that must meet goals, but often do so with-

out dispatching a key worker to hop from location to location to location. One year ago, it was not uncommon for consultants and executives to plan weekly road trips from site to site; today however, many businesses simply don't want to put employees or themselves in an awkward situation.

For these and others, mystery shopping presents a practical alternative.

Top mystery shopping firms employ pools of talent in cities across the country. With a little creativity, a management tour or site survey can be arranged through a mystery shopping firm. Working directly with mystery shopping executives, corporate leaders can outline key criteria, standards and goals for a visit.

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Take for example the executive with a national retail chain. Her job usually includes regular visits to examine all functions within her operations area. Her firm however, has concerns about their executives traveling — but still must meet the same financial, supply, marketing, and sales goals.

This executive can turn to a mystery shopping firm to resolve the situation. Paired with a team of experts within her operations area, the executive could first outline her goals for the visit, and then detail with the team of mystery shoppers exactly how to achieve them.

In this situation, mystery shoppers offer a range of services, including marketing analysis, store examinations, shopper profiles, inventory controls and surveys about customer service personnel and consumer interactions.

Improving customer service

Companies are not alone in navigating through tough economic times.

Consumers in cities across the country are growing uneasy — and sales figures reflect this. Add the competition from online and television shopping outlets and traditional retail outlets face tough times. The situation is often more difficult for smaller mom-and-pop operations that are not located in a high traffic area.

For stores to lure shoppers back, they must focus on the core shopping experience and on treating their customers well.

An example: With consumers spending less, stores must step up even higher than their competition in order to generate income from a smaller pool of customers. Many retailers fall back on the basics — including top-notch customer service.

Determining just what level of service to offer, how it compares to other stores, and how much it will cost is a job in itself. Mystery shoppers are well-suited for this role. Working with company executives, they can determine what is lacking, and what is needed — and most importantly,

what customers want.

A second role of mystery shoppers in this scenario is their work directly with employees. The customer experience may be shaped by the “goodies” given, or services offered, but the customer will remember much longer the treatment received by store employees. This survey however, is usually best handled by an objective third party.


Mystery shoppers can play an integral role in helping stores administer a quality control operation on their most important asset: their people. Shoppers often reward employees on the spot who go beyond the call, take extra time with customers, or make any accommodation to help a customer. Time and again, this tactic has proven successful for companies looking to get an edge on the competition.

New industries

Traditional retail and service companies are not alone in suffering through tough economic times — and they are not alone in their use of mystery shoppers.

Another key sector where mystery shoppers play a key role is in the non-traditional service sector. These new industries are making an increasing number of requests for mystery shopping services, all with the same goal in mind — delivering the best customer service to consumers.

Financial service companies, banks, automotive, insurance and real estate businesses all rely on new customers to keep their businesses booming. These firms need accurate feedback from customers, from shoppers and from associates about their service and effectiveness. Mystery shopping can be an effective way to obtain this information and disseminate it to company decision-makers.

Today, mystery shoppers are being used by corporations large and small to monitor all levels of the customer relationship. In an era when every customer's dollar counts, mystery shoppers are proving again that the most powerful weapon in business is information. 

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Part of the mix



When done properly, mystery shopping can be a valuable addition to service measurement efforts

By Sheldon Dill

Editor's note: Sheldon Dill is director of sales and marketing at Development II, a Woodbury, Conn., research firm. He can be reached at sheldon@development2.com.

There are many marketing professionals who read this magazine who have little knowledge of or experience with mystery shopping. It is no wonder, for there are countless marketing research texts that contain no information about mystery shopping, and the debate still rages if mystery shopping should even be considered a research methodology.

Originally, mystery shopping was used as a tool to uncover dishonest employees. As such, it was immensely disliked by employees.

As our economy shifted from manufacturing to a greater emphasis on service in the 1980s, author Tom Peters focused on the significance of customer service and pushed for increased recognition of its importance. At the same time came the rise of mystery shopping as a tool for improving customer service.

What is mystery shopping?

Mystery shopping is essentially an informational gathering tool. It has three main uses:

- identifying characteristics about an organization and how it treats its customers;
- monitoring the competition;
- accumulating pricing and inventory information.

With data derived from mystery shopping, companies can establish customer service levels and monitor them, as well as identify poor to excellent customer service. It can also be an effective tool for monitoring competition and accumulating pricing and inventory information. In this article most of the emphasis will be on mystery shopping to identify characteristics about an organization and how it treats its customers.

Advantages:

- Mystery shopping helps compa-



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nies retain existing customers, and it is far more cost-effective to retain customers than to attract new ones. It is also an excellent tool for training employees. It can be used as a basis for recognition and rewards.

- Mystery shopping results are immediate and you have the ability to control when the shoppers will complete the surveys. For example, you can have mystery shops done at a particular time and location with specific employees.

Disadvantages:

- Mystery shopping studies are still, for the most part, qualitative research. Whether you do one, five, or even six shops at a specific location, it still has the limitation of providing too little research to form statistically valid assumptions. That can be magnified further when an individual employee might be shopped only once or twice in a given time period and promotions and bonuses might depend on only a handful of shops. It is important to

keep in mind that mystery shopping is a source for gathering information, not a means for doing customer satisfaction research.

- Often the first step in a mystery shopping program is to conduct a baseline study to be used as a point of reference, or yardstick for future mystery shops. Again, one should be cautious when trying to draw comparisons in mystery shops, especially when there may not be enough data to quantify the results.



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Objectivity and the quality of shoppers

The shoppers, whether through vendors, independent contractors, or one's own employees, must be objective and fair. Finding objective shoppers is not as easy as it sounds. I have had to remove shoppers who were biased towards certain employees because those employees reminded shoppers of friends or relatives; in some cases, shoppers did not like a certain company or product.

It is also necessary to train the shoppers properly. This often means going out into the field with them to insure that they have a clear understanding of what is expected from them.

Embarrassment and failure can result if a mystery shopper is "discovered." It happens even to good shoppers. If not handled quickly, it can adversely taint results and objectives. To help avoid such problems, I carefully meet with all shoppers and review results daily.

The shopper forms should be as free as possible from subjective questions. Instead, there should be a wide variety of yes and no answers. Questions such as, "Did the employee stand?" or "Did the employee ask you for the business?" will give you objective and fair responses. Shopping results should be reviewed as soon as possible to check for objectivity as well as for completeness and clarity.

Should employees be told they are being shopped? This is a very sensitive issue. Many have questioned whether employees should be told that they are being shopped. Advance knowledge may bias survey results. This was best shown in the famous Western Electric

Hawthorne Studies.

The Hawthorne Studies were done in the 1920s at the Hawthorne, Ill., plant of the Western Electric Company. There were two test groups experimenting with lighting levels. In one group, lighting levels were adjusted to improve productivity. In the other group, nothing was done. The result was that productivity rose in both groups. After 18 months of analysis it was determined that the high productivity was due in great part to the attention that was paid to workers and not due to the lighting.

On the other hand, if mystery shopping is to have the desired effect, your employees must know what you are doing. They should be told that mystery shoppers will be evaluating them to make sure they are effectively doing their jobs and serving their customers. It is very important that employees buy in to the mystery shop. While it might bias the shopping results by telling employees that they are being shopped, a benefit might be better customer service as they are being shopped.


Mystery shopping studies are still, for the most part, qualitative research. Whether you do one, five, or even six shops at a specific location, it still has the limitation of providing too little research to form statistically valid assumptions.

How is it effective?

To have value as a research tool, mystery shopping needs to be part of


an overall sales program to provide rewards for improvement. Those rewards should include training evaluations and financial incentives, after sales goals have been met. Of great importance is that the sales goals are specific and achievable.

The most effective mystery shopping programs are done in conjunction with other research methodologies, whether it is focus groups to gather more qualitative research, or traditional quantitative methodologies, such as telephone or mail surveys, for quantifiable or measurable results.

Done correctly, mystery shopping will help employees with feedback do their jobs better as part of an overall program. They must know that mystery shopping will be fair, objective, and equitable. Employees will learn valuable information about their faults and their skills. They will learn where improvement is necessary and how to make improvements through a specific training program. Both good performances and improvements will be rewarded. 

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Editor's note: Hal Daumé is managing partner of the Inter-National Consulting Group LLC, a Berkeley Heights, N.J., consulting and research firm. He can be reached at 908-322-9726.

We all want our projects — marketing, research, advertising, promotion, product development — to run smoothly. But if you think technical expertise or business smarts is enough to keep a project running smoothly, think again! Running a frictionless project takes some very important skills that we sometimes overlook in our focus on the goal.

Whether you're developing a new product or ad campaign, a research study, or any project that requires people to interact and share a vision, your technical or business knowledge means you know instinctively how to run it successfully, right? Well, maybe. But that's not necessarily going to win any points with your peers, management, clients, or service providers when it comes to the human side of what makes for success. In fact, the main reason for project failure is "people friction" — the stuff that interferes with acceleration and velocity. People friction has more to do with the success of your project than any other factor! You might be an Einstein when it comes to the subject matter, but if you're not a Winston Churchill when it comes to moving it forward, you and your project are doomed.

1. *Communicate a clear vision.* And always maintain a positive viewpoint. You're the "flag carrier." Carry it high, and forward. Always tell the truth, of course, but tell it in the most positive way you know how. Whether you're introducing a new team member, describing where the project is along its path, or even shifting direction, do it with a smile and a positive outlook. Keep everyone focused on the vision from the time you begin until the job's done, and don't let



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other points of view push you away from your own. After all, if you don't show your belief in success, who will?

2. *Compassion means being firm, too!* Or, as a colleague once told me, "Make your decisions compassionately; execute them ruthlessly." As the project leader, you need to be sensitive to the crosscurrents that surround your project and influence its life. If you get stalled by this kind of friction, so will the project. To keep it moving, keep moving, and stay resolute.

3. *Be specific.* Most projects fail because "Well, someone else can deal with the details." This is how stuff

slips through the cracks. But it doesn't disappear. It gets wedged there, and creates friction. By your example, everyone has to dot the i's, cross the t's. This is one place where being "pathologically retentive" is actually an advantage!

4. *Get commitment.* As the project leader, you're the deal-maker and deal-closer. Half your job is to get and keep management's buy-in to what you and your team are doing. The other half is to keep your team itself in a buy-in mode. If the team starts drifting, you're going to hit a stall situation, and it always takes twice as much energy to get the project moving again than it does to keep it moving. How well you keep your team, management, suppliers, and anyone else you depend on committed to success will determine how successful you're going to be.

5. *Give the respect you want!* Treating others with respect and dignity is always more important than timelines, resource responsibility matrices, budget modifications, or

anything else. Projects can hit a low morale friction block when the leader is aloof, inconsiderate, or overbearing. Leave irony, sarcasm, innuendo and back-biting at the door. Frictionless projects are those where people feel that their opinions are valuable and their contributions are making a positive difference.

6. *Be consistent.* If you start getting wishy-washy on the small stuff, you lose the confidence of your team and they begin to worry that you'll waffle on the big stuff. The most important characteristics a true leader can have are universal and unswerving fairness, and sticking to the basic rules. Uncertainty is the bane of teamwork, because your people become unsure of what to expect from you (this is where the deadly "CYA" memos and e-mails begin to flourish).

7. *Persuasion is a tool, not a weapon.* If you can't persuade others of the merits of your project, how do you intend to get buy-in and commitment? We're not talking about Pollyanna here, but true, fact-based persuasion that convinces others to contribute, perform, achieve, plan, control, evaluate, re-think, and then sweat the details!

8. *You're the peacemaker.* Roadblocks will be hit. People who started out getting along just fine can be at each other's throats in short order. Others on whom your team was relying will drop the ball. This is where you defuse the "pistols at dawn" atmosphere that's bound to arise sometime along your path to success. Remember: adversity is the fuel of success. This is where you turn "We can't" into "How can we" in the most positive way you know. Allow excuses and finger-pointing and the project stalls. Browbeat and it stops. Grovel and the whole project structure collapses. This is the time to lead from the front and take the hill. Keep your people moving forward.

9. *Communicate, and communicate again!* Keep everyone — your team, management, suppliers, everyone — informed of where you are, what you've achieved so far, and where you're headed. If someone misses a

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meeting or conference call, don't "punish" them by withholding memos or reports — get them back on the same page as fast as you can. People aren't part of the process; they are the process!


10. *Share the glory.* Your project's a success! You want the accolades that should rightly accompany that milestone! Don't hoard them. Give them away instead. Give them to your people for their efforts, your management

Frictionless projects are those where people feel that their opinions are valuable and their contributions are making a positive difference.

for their support, your vendors for their flexibility, to anyone and everyone who's helped make it all happen. Do this and you become bigger than the project and its success. When King Arthur invited his knights to share the Round Table with him, he was sharing the glory. Think this didn't work? Then try naming another English king that has more stories and myths surrounding him than Arthur!

Final thought: If all's gone well with your people (first) and your project (the end-result of their thinking and work), you'll have had fun doing it, and so will your team. Fun

that's certainly hard work, and intensive. But isn't fun counter-cultural in a corporation? I don't think so. I'm not talking about humorous or silly kinds of fun — I'm talking about the

joy of success when teamwork works! To paraphrase John Ruskin: The highest reward for what you do isn't what you get for it; it's what you become by it. 



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Useful usability testing



A primer on conducting usability research

By Steve Ellis and Pamela Ellis

Editor's note: Steve Ellis and Pamela Ellis are founders/partners at Inverse Ratio, Inc., an Irvington, N.Y., research firm. They can be reached at 914-674-4411 or at steve@inverseratio.com or pamela@inverseratio.com.

First some numbers: Net Effect reports that 67 percent of Web shoppers click out of the shopping cart before completing a purchase. Accenture says that 35 percent of people who experienced problems on a particular site will immediately leave that site for another. Boston Consulting

group has shown that 45 percent of users abandon Web sites with poor navigability, slow download times, or confusing content.

Fortune 1000 companies will spend an average of \$2 million this year on a single Web site redesign, without actually knowing if the redesign will even begin to address these critical customer experience problems. How has this happened?

We think it's because marketers aren't paying enough attention to the most important aspect of any successful Web site — its usability. Bottom

line: Can your customers accomplish quickly and easily what they are supposed to do on your site? Do you really know? How would you find out? Surveys won't tell you. Focus groups won't tell you. All of these methods involve self-reported data that only measures preferences. It measures saying, not doing. And usability is all about watching what people do and learning from it.

Marketers need to know more about usability research. They need to know how to do it, when to do it, and how much it costs. We think the natural role

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of the marketer on a Web team is to become the user advocate. Who else knows the customer better? Who has the budget to spend on research? Let's get Machiavellian: Who's likely to be held accountable for a poor customer experience in the long run?

Making the business case for usability research

If it isn't scary enough that your Web site might make it hard to accomplish a basic task, like finding product information or making a purchase, there are hard numbers you can point to to make the business case for usability research. Conversion rate, or the number of shoppers who become buyers, is something on everyone's mind these days. Sites that have been improved through usability testing typically have higher conversion rates and less customer churn.

Let's look at conversion rate. With an industry average of around 1.8 percent there would seem to be nowhere to go but up. By increasing a conversion rate of 2 percent to 3 percent, your revenues will increase by 50 percent. Studies have shown that the cost-benefit ratio of a usability study can be as high as 1/400 (for every dollar spent \$400 is saved or made). If you've done usability research in your organization (or a naysayer has) and didn't see a significant improvement in your conversion rate, a reduction in churn, or efficiency improvements, you may have serious problems with how that research was done.

What usability is and is not

First, a few words about what usability research is not. It is not focus groups with computers on the table, where participants are prompted to spout off opinions about what they like or don't like. It is not a post-hoc survey tacked onto a Web site with questions like "Did you find this feature usable?" It is not grabbing people from the accounting department and sitting them down in front of the developer's workstation and asking them what they think (although this would probably be better than nothing!). Usability research is not about preferences or opinions. It is not "I like this design"

or "This color scheme really stinks!" But don't worry. People will naturally tell you what they like and don't like.

All good usability research is aimed at discovering what people are able to accomplish based on cognitive and physiological ability. If someone is not able to find the download button, typically it is because he or she cannot see the button or the button is difficult to click. It is for this reason that narrowly defined usability studies are valid with as few as eight (some would say five) participants. As humans our cognitive and physiological abilities are not as variable as, say, our personalities, preferences, and opinions. So usability research does not require larger samples, as do opinion studies, to be predictive.

Demographics and geography are not as relevant in usability research as they are for opinion-based research. However, if the site is designed for automotive engineers, you are best off if you find those people. If you don't, it won't necessarily invalidate your data, because engineers (despite what some say) are still human, after all.

What is important is that all of the users you get have a baseline of skill for using a mouse and a keyboard. Time spent teaching someone how to double click will not be time well spent. A good deal of our recruiting effort is directed toward screening for these often taken-for-granted skills. Almost nothing can undermine your credibility more than testing an application for usability on someone who doesn't know how to use a mouse.

Most of the usability research we do takes place one-on-one with a moderator who walks (but doesn't lead!) a user through a set of predetermined tasks. We log what users do onscreen with video of their posture and facial expressions. Usually sessions last about an hour. Each session produces a rich dataset, which is analyzed and distilled so findings can be communicated effectively.

The way usability studies are conducted is often a source of confusion for the uninitiated. Watching a usability study for the first time can be variously funny, excruciatingly boring, depressing, and revelatory. The con-

fusion arises from the fact that we are interested in trends across multiple users. To get evidence of a major problem you have to sit still and be attentive for more than five hours at a time, something most people are simply not capable of.

The different types of usability research and the development process

All usability research is not created equal, which is not to say that some methods are necessarily better than others. Rather, different research situations and goals require different methods. The trick is knowing which method works best in what situation. Slightly more free-form and open sessions make more sense early in the project lifecycle when you want to know just as much about what users want to do as you do about how they do it. Here you can swap out different prototypes representing different tasks and get immediate feedback about which is better. Keep in mind, as with all usability testing, we're not as concerned with features that users say they want as we are with watching and learning from what they do. So having them interact with prototypes is key.

As the project progresses and new versions are created a more rigorous form of usability testing is appropriate. Here it makes sense to focus almost exclusively on tasks and people's ability to complete them. And here comparing an old version with a new and "improved" version will have the greatest impact. Sessions like these can be extremely effective in resolving differences of opinion about the elements of the user interface that actually work. If the sessions are done well, it should also be possible to provide hard numbers that show one design element is better than another.

How Web development processes work and where the marketer fits in

Marketers are frequently in the position of hiring usability researchers. They have the research budgets and product development teams often go to them for help. More and more marketers are taking a proactive role and actively participating in product devel-

opment acting as the chief customer advocate. If you choose this role (and we think you should!) be aware that you may be stepping into the lion's den.

When you bring a usability specialist in make sure they meet all the right people from the team on day one. Your credibility is at stake and nothing makes a programmer unhappier than the prospect of someone telling him he is going to have to change his code. You and your usability researchers have to earn everyone's trust with your knowledge and confidence that what you are doing is critical to the project's success.

How much usability research costs

Like any professional service, the cost of usability research varies depending upon the project requirements. Contrary to what some believe you do not need a \$100,000 usability laboratory to get results. It is preferable that the research firm have its own means of logging the data it collects in some sort of video format. We use a setup that fits in a suitcase that can be checked as baggage. Expect to pay between \$10,000 and \$20,000 per day of testing with eight to 10 participants a day. This should cover every aspect of the testing, from recruiting to reporting, with costs per day going down for each successive day. Using an informal setting like an office or conference room can save money. Your goal should be to keep costs low and to focus on testing successive iterations of the design rather than blowing it all on the all-encompassing perfect study.

How to use the results of usability research to make real improvements

Good usability researchers don't just point out what is wrong with a Web site or application. They have an intimate knowledge of the technology they are studying and are fully capable of making concrete recommendations about how to make it right once problems are discovered. If they don't have this knowledge, or waver for a moment when presenting their findings when asked a question by an engineer or developer, their credibility all

but flies out the window, and so does the validity of the research. Developers have a strong tendency to disrespect anyone who is going to tell them how to do their job who doesn't know their job inside out (and is able to display that knowledge in touchy situations).

All of this is to say that the worst usability research, no matter how expertly done, is the kind that has no impact on design. The goal of all usability research should be to make changes that make a real difference to the customer experience. Everyone on the team needs to be dedicated and motivated to make this happen. Lead the way and reap the rewards!

Establishing metrics and measuring success over time

Having hard numbers to point to when things get tough doesn't hurt. Numbers come in handy the most when two designs are being compared. If a study is designed correctly, it should be possible to show with numbers why one is better than the other.

Success rate is a number that we often use when quantifying the results of a usability study. Simply stated, success rate is the percentage of people who were able to complete a given task. Each task under consideration (such as purchasing a hat or finding product information) can have a success rate associated with it. What qualifies as "success" is up to the usability researcher. The key is that the standard be applied consistently across participants and design iterations.

Success rate captures information about tasks, but let's say you were interested in things that aren't directly related to a task, like the success of your navigation scheme, how many times a user encounters an error, or even whether users express a feeling of distrust while filing out your registration form. For things like this we have invented a metric called, appropriately enough, the pain factor. Unlike success rate, which you would like to see increase, pain factor always needs to be reduced.

It's the subtleties

It may sound completely crazy but

we find that the average Web site has more than 100 usability problems prior to undergoing a thorough review. This isn't to say that all of the problems are major problems. Things like an incomprehensible error message or poorly defined navigation category would be included in this long list. Most sites have three to five major problems that severely impact the overall usability. Here we would include things like task flow for critical tasks like registration and the location and style of global navigation.

The point is that we have to recognize that creating a usable site is just as much about the little things as it is about the big things. The fact that the Web is an extremely mutable medium is both its blessing and its curse. The only thing that Web sites necessarily have to have in common are things like radio buttons, check boxes and text input areas. After that, all bets are off. Your navigation can be floating off to the left or in the upper right. Your link colors can be any one of 216 colors. While allowing for a great deal of creative freedom, it ultimately confuses users. The goal is to become expert in what doesn't confuse people and be effective communicating that to the project team. Implementing a customer experience program, of which usability testing is a part, will be a major step in the right direction. ☞

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Research Industry News

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throughout Europe. Under the three-year agreement, Autometrics will receive Nielsen//NetRatings information for all of the European countries covered by Nielsen//NetRatings.

Awards

Group Dynamics in Focus, a Bala Cynwyd, Pa., research firm, has been recognized by the Greater Philadelphia Chamber of Commerce's Small Business Excellence Awards as "service company of the year." Merle Holman, the firm's president, accepted the award at the Hyatt Regency Philadelphia in November.

Chicago-based **SPSS Inc.**'s Clementine and AnswerTree data mining programs were named the two most popular data mining tools by the readers of *KDnuggets News*, a data mining and knowledge discovery industry e-newsletter. In a poll asking visitors to the KDnuggets Web site (www.kdnuggets.com) to name the data mining tools they regularly use, Clementine and AnswerTree finished first and second, respectively. In an identical poll published last year, Clementine and AnswerTree also finished first and second.

New accounts/projects

Royal Philips Electronics of the Netherlands has selected **SPSS BI**, a division of SPSS Inc., as its worldwide preferred supplier of business intelligence software. The master supply agreement allows Philips locations in over 60 countries to secure SPSS data mining and statistical software by issuing a purchase order, with the pricing, terms and conditions negotiated in advance.

Chicago-based **ShopperTrak**, a provider of retail technology solutions, will install its Orbit II customer traffic counting systems in all Apple retail stores throughout the U.S.

Nuremberg, Germany research

firm **GfK** has won contracts for two large projects with a total volume of approximately EUR10 million for 2002 and 2003. The projects will be carried out by GfK companies in the Consumer Tracking division in the Netherlands and Switzerland. The first contract is for an analysis of housing demand (*Woningbehoefte Onderzoek 2002*) for the Dutch Ministry for Housing (Ministerie van Volkshuisvesting, Ruimtelijke Ordening en Milieubeheer). The survey will form the basis for planning at the Ministry as well as at a range of social and economic institutions at national and regional level. The second contract is with Swiss retailer Coop and covers a project linking scanner data from Coop with panel data from IHA-GfK. Coop intends to develop a Web-based knowledge system for promotional activities and new product launches which can be used in category management.

The Social Research business of Princeton, N.J.-based **Opinion Research Corporation** has been awarded nearly \$2.5 million in new contracts under its recently signed Multiple Task Order Contract with the U.S. Department of Education (DOE). The DOE Multiple Task Order Contract, also known as an Indefinite Delivery, Indefinite Quantity (IDIQ) Contract, extends through April 2006. This type of procurement qualifies the company as one that is able to compete for DOE research, analysis, measurement and other similar services.

New companies/new locations

Norman Stolzoff has launched **Ethnographic Insight**, a custom marketing research firm, at 440 Donovan Ave., Bellingham, Wash., 98225. Phone 360-325-8166. E-mail nstolzoff@home.com.

Julie Fichtner and Tiffany Stewart have co-founded **ACE Mystery Shopping** at P.O. Box 11, Warrensburg, Mo., 64093. Phone 660-429-1135. Web www.acemysteryshopping.com.

Product & Service Update

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channel usage by market segment and by product category; customer channel requirements (e.g., Web site feature/functionality, service levels, response times, and delivery and fulfillment); customer satisfaction level; and customer market segmentation and growth analysis. For more information call Mike Kelleher at 301-907-3800 or visit www.marketbridge.com.

New edition of Alberta Technology Report

In late January, Ernst & Young LLP and Canada-based Ipsos-Reid plan to release results of the 2001 Alberta Technology Report, a study based on an online survey of technology industry decision-makers in the province of Alberta. Now in its third year, the Alberta Technology Report asks CEOs and senior executives in Alberta's information technology sector to identify the trends, challenges and issues facing the province's IT companies. In addition to gathering annual baseline information, the study will: examine the post-September 11 impact on human resource policies; look at employment opportunities, and corporate attraction and retention techniques; investigate the real or imagined lack of venture capital and its importance to future industry growth; quantify spending trends in the areas of sales, marketing, and research and development; and ask CEOs to cite specific initiatives that various levels of government might take to further support the industry. For more information visit www.altatechreport.com.

Briefly...

Las Vegas-based MRCGroup Research Institute now offers Perception Analyzer **wireless technology for real-time behavioral response testing** and analysis of movie trailers, network and cable television program pilots, and com-

mercial spots. In MRCGroup's research theater, researchers can now compare multiple commercials, trailers and/or pilot shows using trade-off comparisons as well as discrete, scale, and moment-to-moment evaluation. For more information call Jim Medick at 702-734-7511.

Meneses Research & Associates is offering the "Ask San Diego" **Report 2001**, which includes results of a survey among Hispanic and non-Hispanic consumers in San Diego County, Calif., on awareness, attitude, and usage of products and services. For more information contact Walter Meneses at 619-276-5335.

Germany-based agricultural market research firm Kleffmann has introduced amis4you, which gives clients **online access to agricultural market research data** from

studies conducted with farmers in 42 countries. For more information visit www.kleffmann.com.

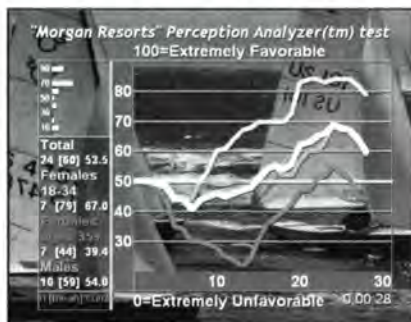
New York-based information firm CMR has **added six Canadian markets to its Broadcast Verification Service (BVS)**, which tracks the occurrence of television programming and commercials within hours of airing. The Canadian markets that BVS now serves include Toronto, Montreal, Vancouver, Calgary, Edmonton, Halifax, and 39 specialty cable television networks.

InsightFarm, a Livingston, N.J., media research and consulting firm, has completed a study on media coverage and portrayal of two topics in the biotech industry — **genetically modified foods and cloning**. For more information contact Bruce Jeffries-Fox at 877-839-9770 or visit www.insightfarm.com.

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Survey Monitor

continued from p. 8

kids reporting candy purchases. Candy was an especially popular choice among younger kids (ages 6-8), with 66 percent reporting buying it, as compared to older kids (ages 12-14), who reported buying candy 49 percent of the time. Older kids are significantly more likely to purchase beverages; 38 percent reported that they used their own money to buy beverages, whereas only 24 percent of younger kids reported buying beverages. After food, younger kids prioritize buying toys, whereas older kids choose to spend their money on clothes and music. In fact, 58 percent of younger kids said one of their past three purchases had been a toy, compared to only 18 percent of older kids. Likewise, older kids reported purchasing clothes (37 percent) and music (21 percent) as compared to younger kids who purchase these items only 16 percent and 9 percent respectively.

On average, kids claim to spend between \$8-9 per week. Boys and girls tend to spend the same amount of money per week, but older kids are spending about twice as much as younger kids. While these relatively small purchases might not seem to amount to much, in reality, kids are spending more than \$16 billion of their own money per year.

And just how well do kids really understand the concept of money? They have a pretty good understanding that while money is not the key to happiness, it is extremely important. Only 15 percent of the kids thought that people with money are the happiest in life. However, kids do think that money has the potential to make them happier. Ninety-four percent of them thought they would definitely or possibly be happier if they woke up tomorrow with \$10,000. Interestingly, more boys think that money will make them happier compared to girls. Seventy-five percent of the boys sampled emphatically agreed that acquiring more money would make them

happier, as compared to 64 percent of girls.

When kids were asked in an open-ended format what they would buy if they won \$10 in a lottery, a typical response was toys. When that figure was raised to \$1,000, many kids said they would buy more toys. And if kids won \$1 million in a lottery, most said they would want to buy even more toys and also buy some things for their parents.

In terms of being strategic or impulsive with their money, kids are pretty split down the middle. Boys are slightly more likely to act impulsively with their money: 60 percent of boys said they would rush right out to buy something when they wanted it, while 51 percent of girls said they would rather save their money until the time was right. For more information call Paul Metz at 312-828-9200 or visit www.crresearch.com.

Newspaper readership holding steady

Newspaper readership in the top 50 U.S. markets gained nearly a full percentage point in the Newspaper Association of America's Fall 2001 Competitive Media Index (CMI), an NAA analysis of market data from Scarborough Research for the period ending March 2001.

In the top 50 markets, 54.3 percent of all adults said they read a newspaper yesterday, a gain over the 53.5 percent reported in the spring CMI report. Sunday readership held steady at 63.7 percent, compared to 63.8 percent in the last CMI.

"The newspaper industry has put tremendous effort and resources into shoring up its readership base, and it's encouraging to see a gain in our reach," says NAA President and CEO John F. Sturm. "Further, since the survey period for this report ended in

Top 10 Daily Newspaper Readership Markets (among the top 50 U.S. markets)

1. Hartford/New Haven (65.3%)
2. West Palm Beach (63.8%)
3. Boston (63.6%)
4. Cleveland (62.2%)
5. New York (62.1%)
6. Providence/New Bedford (62.0%)
7. Tampa/St. Petersburg/Sarasota (61.7%)
8. Harrisburg/Lancaster/Lebanon/York (61.0%)
9. Philadelphia (60.4%)
10. Pittsburgh (60.3%)

Top 10 Sunday Newspaper Readership Markets (among the top 50 U.S. markets)

1. West Palm Beach (75.6%)
2. Tampa/St. Petersburg/Sarasota (75.3%)
3. Providence/New Bedford (73.7%)
4. Cleveland (73.5%)
5. Hartford/New Haven (73.1%)
6. Minneapolis/St. Paul (70.9%)
7. Buffalo (70.8%)
8. Philadelphia (70.5%)
9. Milwaukee (69.9%)
10. New York (69.6%)

March 2001, these numbers stand alone. They do not reflect the surge in readership we've heard about from folks picking up newspapers to help them comprehend the events of September 11 and their aftermath."

When looking at a full week, the number of people who read a newspaper increases significantly. Over five weekdays, newspapers reach more than seven in 10 (72.9 percent) adults, and over four Sundays, newspapers reach more than three-quarters (77.4 percent) of adults in the top 50 markets.

Other media held steady or showed slight declines from the spring CMI to the fall. The average half-hour of prime-time TV held steady at 38.8 percent of adults, compared to 38.6 in the spring. The same block of cable prime-time reached 12.9 percent of adults, faring slightly better than the 12.2 last spring. The average quarter-hour of both morning and afternoon radio drive-time fell to 21.9 percent (from 22.9 percent) and 17.9 percent (from 18.5 percent), respectively.

In addition to reporting newspaper readership trends, NAA conducted an analysis of data in the Audit Bureau of Circulations' (ABC) Fas-Fax report for the six-month period ending September 30. Based on ABC data, NAA concluded that for the 757 papers reporting for this period, total daily circulation was 47,861,622; the 593 Sunday papers saw total net-paid circulation of 52,596,972.

Several ABC rule changes affecting how newspapers report paid circulation make it difficult to compare data from this Fas-Fax with that reported a year ago. Although this Fas-Fax reporting period includes the increases in newspaper sales since September 11, the data are averaged over a six-month period ending September 30.

"New definitions created by ABC for what constitutes paid circulation mean that comparing this report to the previous year's numbers is unworkable," says Sturm.

"NAA's core focus is readership and we will continue to report readership analysis from the CMI twice a year," Sturm says. "This is the last time NAA will provide an analysis of

aggregate ABC data. We are hopeful that in the future ABC will report aggregate Fas-Fax totals."

The chart shows a list of adult readership in the top-10 daily and Sunday newspaper markets, according to the Fall 2001 CMI.

The CMI is based on audience research data collected by Scarborough Research, New York, to which NAA subscribes. Scarborough measures 75 DMAs (including the top 50). It collects data via telephone interview and a mailed consumer survey booklet and seven-day TV diary. Scarborough collected fieldwork for Release One 2001 from February 2000 through March 2001. For more information visit www.naa.org.

Ranks of women-owned firms keep growing

The expansion in the number of women-owned businesses with 100 or more employees, as well as those with \$1 million or more in revenues, is outpacing the growth rate of all businesses of the same size, according to a new study from Center for Women's Business Research (founded as the National Foundation for Women Business Owners), which was underwritten by Wachovia Corporation and conducted in cooperation with Dun & Bradstreet. The study also documents that women-owned businesses are as financially robust and creditworthy as all businesses, regardless of size.

The study, "Removing the Boundaries: The Continued Progress and Achievement of Women-Owned Enterprises," takes an in-depth look at the characteristics of commercially active women-owned firms in the United States between December 1997 and December 2000, focusing on growth and financial strength.

The study found that the number of women-owned firms with 100 or more employees increased by 43.9 percent, which was 68 percent faster than all businesses breaking the 100-employee mark during the 1997 to 2000 period. The ranks of women-owned firms with 500 or more

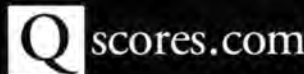
employees are expanding even faster. The number of these firms increased by 124.3 percent over the same period, nearly triple the growth rate among all firms of this size. Further, the number of women-owned firms with revenues of \$10 million or more grew by 36.8 percent, more than three times the rate of comparably-sized firms.

The study also reaffirms that women-owned businesses are just as financially robust and creditworthy as the average U.S. firm.

"This new and compelling information demonstrates women-owned firms' continuing vitality and growth," says John Guy, small-business segment executive for Wachovia. "There are no differences between the scores registered by women-owned firms and the scores of the average U.S. firm in three key measures — bill payment, financial stress and overall creditworthiness. On a five-point scale of financial stress, the vast majority of women-owned and all firms are at the low end of the scale, with 74.3 percent of women-owned and 70.6 percent of all firms under very low levels of financial stress. In addition, when assessing overall creditworthiness, 65.7 percent of women-owned firms have a low to moderate credit risk rating, compared to 62.9 percent of all firms."

Contrary to common perception, women business owners are no more likely than men to have home-based businesses. Just over one-fourth (27.9 percent) of women-owned firms are home-based, as are 23.9 percent of all commercially active U.S. firms.

The study also confirms that women own businesses in every industry and the rate of growth in the number of women-owned firms exceeds the industry average in nearly every major industry group. The growth in the number of women-owned businesses is highest in agri-

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culture/forestry/fishing (79.3 percent), engineering/accounting/research services (30.4 percent), real estate (26.7 percent), durable manufacturing (26 percent) and other services (21.9 percent).

"Women-owned businesses also continue to start firms in every industry, with one-third [33.6 percent] of women-owned firms being less than four years old," says Ron Wesson, senior vice president for minority- and women-owned business solutions for D&B. "The industries with the greatest share of women-owned startups over the past three years are health services [45 percent], retail trade/general merchandise stores [44.4 percent], finance and insurance [37.5 percent], engineering/accounting/research services [36.4 percent] and business services [36.2 percent]."

Women-owned firms are as likely as all firms to remain in business. Two-thirds (65.5 percent) of the women-owned firms that were in business in December 1997 were still in business at the end of 2000, similar to 66.2 percent of all U.S. businesses.

The age profile of women-owned businesses is moving toward that of all firms, although women-owned firms are still somewhat younger than the average U.S. firm. There is significant growth in the number of early stage growth women-owned firms — more than one-third (37.7 percent) of women-owned firms are from three to 11 years old, compared to 29.6 percent of all U.S. firms.

Regional differences can be seen among women-owned firms in terms of growth, entry of new women-owned firms, and financial strength and creditworthiness.

In every region of the country — with the exception of West North Central — the growth rate in the number of women-owned firms exceeds the regional growth rate among all firms.

The regions with the greatest share of new women-owned firms are the Mountain and West South Central states (49.9 percent in each region are less than six years old) and the South Atlantic region (47.3 percent).

Women-owned firms in the North and East exhibit the best overall financial strength and creditworthiness. On three measures — bill payment, financial stress and overall creditworthiness — women-owned firms in the Northeast and West North Central regions perform better than the national average.

On an industry basis, women-owned firms in mining and finance/insurance/real estate have better than average ratings on all three measures of financial strength and creditworthiness. For information contact the Center for Women's Business Research at 202-638-3060 or at www.womensbusinessresearch.org

Not afraid to fly

A survey of 400 air travelers conducted in late October 2001 by Milwaukee-based Market Probe found that 39 percent exhibited a high level of comfort in planning their next airline trip. Thirty-two percent showed a moderate level of comfort and 29 showed low levels of comfort. New York and Washington, D.C. were two cities most travelers are not comfortable flying to, followed by Los Angeles and Chicago. Among people who had flown since September 11, comfort levels were slightly higher. Forty-eight percent of those flying after September 11 reported a high level of comfort in planning their next airline trip with another 32 percent showing moderate levels of comfort; 20 percent felt low levels of comfort. For more information visit www.marketprobe.com.

Energy issues not top-of-mind

Americans appear to have turned their attention away from energy issues, based on the results of a survey conducted by International Communications Research, Inc., Media, Pa., for Deloitte & Touche LLP between October 3 and October 7. At the same time, the survey of more than 600 respondents indicates

consumers have increased concern about fuel price, security and reliability, with fewer survey respondents in 2001 (39.7 percent) being aware of changes in the electric industry compared to 2000 (50.5 percent). This reverses a five-year trend of increasing consumer awareness of changes in the electric industry. An even greater majority of survey respondents in 2001 (56.2 percent) versus 2000 (52.7 percent) expect that electric rates will increase rather than decrease due to deregulation.

"Not only are consumers less informed, they appear to be more pessimistic about the benefits of electric deregulation," says Gregory Aliff, managing partner of Deloitte & Touche's Energy Resources Group practice. "Our survey indicates that consumers continue to be concerned about prices, reliability and availability of electric services in the future. Less than half the states have taken any action on electric deregulation, so the survey reflects some backsliding from 2000."

Survey results for awareness varied widely in part because there is no national policy concerning consumer choice of electric supplier. The decision to introduce competition for electric supply to consumers is reserved for state-by-state determination. Currently about half the states have passed legislation or taken regulatory action.

"For the 2001 survey, we also added questions concerning nuclear power and increasing domestic oil and gas consumption," says Branko Terzic, director of the regulatory services at Deloitte & Touche. "Respondents were overwhelmingly for increasing domestic energy production [73 percent "yes"], but were almost evenly split [42.3 percent for, 47.6 percent against] on the issue of resuming nuclear power plant construction when considering the margin of error in the survey." For more information contact Sally Wilson at 703-251-4333 or visit www.us.deloitte.com.

Shopping goes bad

continued from p. 21

and the linking of performance data to incentives and training. Mystery shopping vendors tend to view their product as a commodity — an attitude reinforced by the vendor selection process used by many companies. As a result, they often function as order-takers rather than partners in the development and execution of strategic quality initiatives.

Mystery shopping suppliers also have an unfortunate tendency to over-promise. This may be perceived as necessary to win accounts, but it results in unrealistic expectations and inadequate planning by the purchasing companies. Vendors sometimes make inflated claims about the rigor of their shopper selection and training, the number of shoppers who work for them, their ability to field shops in a timely manner, and the speed with which they are able to provide data. As a result, vendors frequently get in over their heads, and a relationship of defensiveness and finger-pointing develops between the vendor and the purchasing company. This situation is not likely to change until purchasers become more knowledgeable and realistic about the limitations of mystery shopping and until vendors muster the courage to turn down accounts they know are potentially troublesome.

On the positive side, a few mystery shopping companies are now becoming more sophisticated and rigorous in their approach. Some have designed Web-based programs for hiring, training, certifying, and deploying mystery shoppers, resulting in wider coverage, greater consistency and better quality control. These systems also provide online reporting within hours instead of weeks, making the data considerably more useful to purchasing companies.

Executives. Mystery shopping programs are typically developed in response to broader service quality initiatives. Conceived at the top tiers of the organization, these initiatives may be well-intentioned but they are often vague about deliverables; it is up to the middle level of the organization to work out the details. Lacking a clear roadmap and

specific objectives, departmental managers will create programs that serve their own needs but that are not necessarily coordinated with the broader initiative. Thus, people in the operations, marketing, training and human resources departments may all end up running overlapping service quality programs that provide redundant data without being effectively integrated. For example, marketing typically “owns” customer satisfaction, branding and image research, while operations owns mystery shopping, call-monitoring and other performance measures. Seldom are these programs brought together in a coherent architecture that creates useful synergies and provides an optimal return.

In short, company executives have a tendency to launch big service initiatives without thinking them through. Companies may be surprised when their mystery shopping results don't correlate well with customer satisfaction, increased revenue, or lower costs. But unless these variables are factored into the program design from the beginning, it's unlikely that strong correlations will result.

Managers. Mystery shopping should make life easier for managers. It should provide reliable, ongoing data for assessing performance, coaching employees, and increasing profitability. Over time the value of mystery shopping should far exceed the effort required to set up and

administer the program. However, achieving this level of value requires specialized knowledge that most corporate managers lack.

This information deficit comes at a high cost. Mystery shopping programs frequently suffer from ambiguous objectives, poor design, lack of buy-in from the field and inadequate internal administration. As a result, managers may spend an inordinate amount of time handling internal complaints and wrestling with their mystery shopping vendors. Employees and field supervisors who should be using the data to improve their service skills instead expend their energy exposing shoppers and discrediting the program. Employing a “shoot the messenger” strategy, corporate managers react by churning through mystery shopping suppliers instead of re-evaluating their approach. As a result they repeat the same mistakes year after year with vendor after vendor. Eventually they lower their expectations to the point where a successful program is defined not by its benefits, but by how few headaches it creates.

Such a scenario is common but far from inevitable. Corporate managers can achieve great value and success from mystery shopping by following a few guidelines:

- Define clear objectives. Considering the high price tag that comes with mystery shopping research, it's incumbent

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upon company managers to define their goals in specific and measurable terms.

- **Keep it simple.** In the interest of internal consensus, mystery shopping programs are often designed by committee, which can lead to the program becoming hopelessly complicated and cumbersome. Unrealistic scenarios and long, complex questionnaires are common, creating great frustration for mystery shoppers and program administrators. In such cases the likelihood of shopper exposure is increased and the accuracy of the observations suffers. Simpler designs work better and provide more value.

- **Hire a vendor that can be a partner.** Large companies often employ an excruciating bidding process that rarely identifies the best vendor for their needs. They issue lengthy RFPs for mystery shopping that are meant to weed out the weakest contenders, but by asking bidders to commit to overly detailed and inappropriate specifications they effectively eliminate more sophisticated companies at the same time. The typical RFP process creates an environment in which mystery shopping vendors over-promise in order to make the first cut, thus setting themselves up for failure if they win the account. In addition, it treats mystery shopping research as a commodity, regarding it as a bulk purchase of data rather than a high-value quality improve-

ment tool. Companies have more success when they research the market carefully and identify the companies that have the knowledge and commitment to help them build a truly valuable program.

- **Obtain buy-in from the front-line.** When mystery shopping initiatives fail to meet their potential it is often because the people who are accountable for the results — front-line employees, supervisors, store managers, and regional managers — were never properly introduced to the program. As a result there may be internal resistance, creating an unnecessary distraction from the achievement of the company's service improvement goals. If an incentive tie-in is introduced to the program this situation becomes magnified. To ensure success, employees throughout the organization must be fully informed and bought into the mystery shopping program before it is launched. Pre-launch efforts should include training on how to read mystery shopping reports, how to use the information effectively, and how to set goals for improvement.

- **Provide adequate internal administration.** Few companies anticipate the amount of administration necessary to run a successful mystery shopping program. A common mistake is to assign young, inexperienced personnel to handle the program — a sure prescription


for chaos. It requires a strong administrator to keep the company focused and on board, and to make sure that recalcitrant field managers are not able to undermine the program before it stabilizes and begins to realize its potential value.

- **Plan for change.** Even well-designed and administered mystery shopping research requires periodic adjustment. Performance scores eventually flatten out or cluster together, diminishing the value of the program as a tool for rewarding top performers and continuously improving quality. Periodic reviews should be worked into the program design so it can be kept relevant and useful, and so the bar can be repeatedly raised on service quality and employee performance.

Meeting the demand

The consumer demand for better service is growing all the time. Companies struggle to meet this demand in the face of high employee turnover, shrinking profit margins, and increasing competition. At the same time the business landscape is becoming more and more complex, with 24-hour, multi-channel service now a basic consumer expectation.

Mystery shopping is among the more powerful tools available to companies seeking to improve their service quality. Providing objective data about service execution across locations and delivery channels allows managers to identify specific areas for improvement and to reward employees in a consistent, relevant manner. Despite the problems many companies have experienced with mystery shopping, the need for this research will only increase as customer demand for high-quality service grows.

Improving the way mystery shopping is conducted will benefit consumers, companies, and suppliers. Changes in the mystery shopping industry and in the capabilities of some vendors are leading to better data collection practices, but much progress remains to be made. On the other side of the equation, if companies are to benefit from these changes they need to improve the process by which they initiate, design, and administer mystery shopping programs. 

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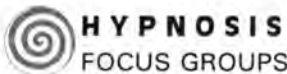
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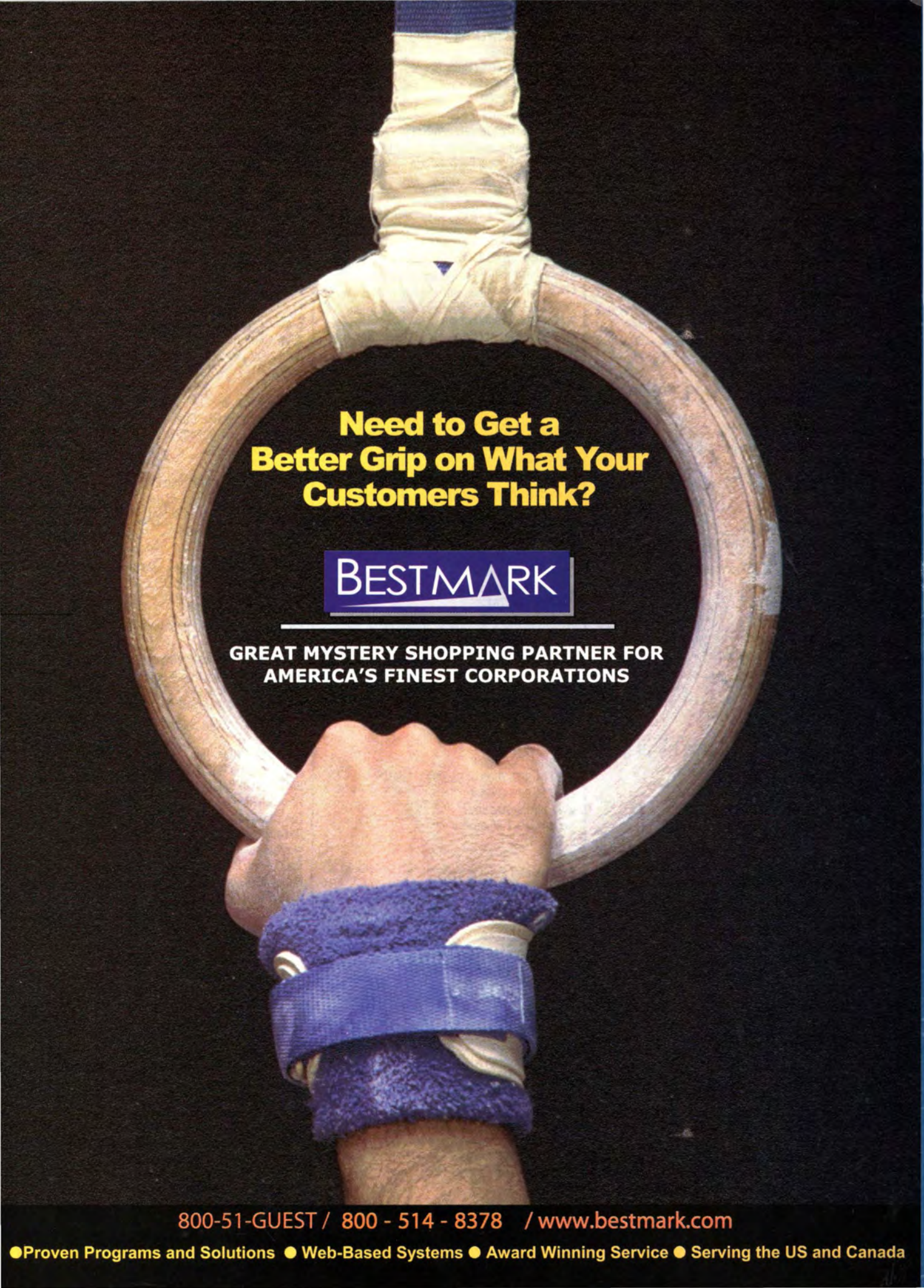
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Trade Talk

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becomes more than a fad and becomes something that is part of the fabric. I think we've reached that point," Houlahan says.

Using figures from ESOMAR as a basis, Houlahan estimates that there were 240,000 focus group sessions conducted in the U.S. last year and 482,000 worldwide. He says 10 percent of U.S.-conducted groups were viewed on FocusVision equipment — a figure he would like to see at 30 percent. ("Preferably while I'm still alive," he jokes.)

Remote moderating

In addition to the remote viewing of focus groups, remote moderating is now becoming more frequent, Houlahan says. "More and more, moderators are saying, 'If the client doesn't want to travel, why is he sending me on the road?' Moderators like to be with their clients but no moderator likes to travel. And with clients dropping out of the travel equation, it's made the moderating community more willing to look at alternatives."

One such moderator is Sharon Livingston, president of Executive Solutions, a Syosset, N.Y., research firm. Livingston has taught seminars on moderating and facilitating remote groups and in an article in the firm's e-newsletter in October she described the distance-moderating experience as "freeing" for the moderator — no more travel hassles, for example — and also for the respondents, some of whom reported feeling more comfortable sharing thoughts with a person on a TV monitor than with a person in the room with them.

"The moderating community is falling all over themselves to do groups using online chat rooms, where they can't see the respondents, and doing telephone interviews, where they also can't see anybody," Houlahan says. "Videostreaming is one-way so you can't do remote moderating, but you can do remote moderating by two-way videoconferencing."

Research more important than ever

With the economy in the throes of recession, it's even more important for companies to persevere with research, whether it's viewed in-person or on a TV monitor. "On the surface it would seem to be a dismal time for qualitative research," Houlahan says. "But there is now more reason than ever for companies to stay in touch with their customers, because everything is so fluid now — ad campaigns are being re-thought, new product programs are being reconsidered and modified...all of those things cry out for qualitative research. The good news is, clients who want to do an essential research project can do it, and they don't have to jump on an airplane if the project involves viewing qualitative research." ❏

Qualitatively Speaking

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plier/consultant has the expertise to do more than simply moderate a group.

Second, obtain a detailed proposal from the researcher that outlines the approach to the assignment and the rationale for that approach.

Third, give your researcher some leeway on how the project should be handled, and recognize that this person might have much more experience with the research approach than you do. To this end, it is essential to recognize that the objective is to obtain the information you need, not to win methodology battles.

Finally, try to allocate sufficient time to plan a project so that you can change research professionals if you and your supplier cannot agree on the best way to execute a project. However, if you decide to do this, be sure you are not making a change simply to protect your damaged ego. Instead, you should be doing it to find a more effective research professional for your assignment than the person you had originally had retained.

Benefit of the doubt

Whenever you retain a professional to work for you, it is generally better to give the individual/organization the benefit of the doubt when it comes to issues where they have special expertise. While this does not suggest that the client organization should relinquish its role as "the client," it does clearly indicate that it is often better to listen to the expert rather than try and be one yourself. As the saying goes, he who acts as his own attorney has a fool for a client. ❏

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Trade Talk

By Joseph Rydholm, QMRR editor

Videoconferencing moves from convenience to necessity

In early 2001, it appeared that the viewing of focus groups via videoconferencing and Webconferencing had reached new levels of acceptance and viability. But a failing economy and the events of September 11 pushed the remote viewing of qualitative research past technological marvel status to a near imperative for some firms. Today, with cost- and liability-conscious companies slashing travel budgets and canceling employee trips, even workers who want to travel aren't able to.

Many of those who are unable to fly to view focus groups have started calling John Houlahan, founder and president of New York-based FocusVision Worldwide, a provider of videoconferencing services to the research industry. Following September 11, business increased 120 percent over the previous year's levels, Houlahan says. "We do business with 350 clients yearly and before September 11 we had done business with 315 clients in 2001. Immediately after September 11 we added 104 clients. We had companies that for a long time had been refusing to talk to us suddenly calling to do business," he says.

After the initial post-attack wave of cancellations of all focus groups came a re-booking of those groups into facilities with videoconferencing equipment, Houlahan says. As a result, several of the focus group facilities in the FocusVision network added a second videoconferencing system after having to turn away business because their first system was booked solid.

(The overall market for videoconferencing looks set for

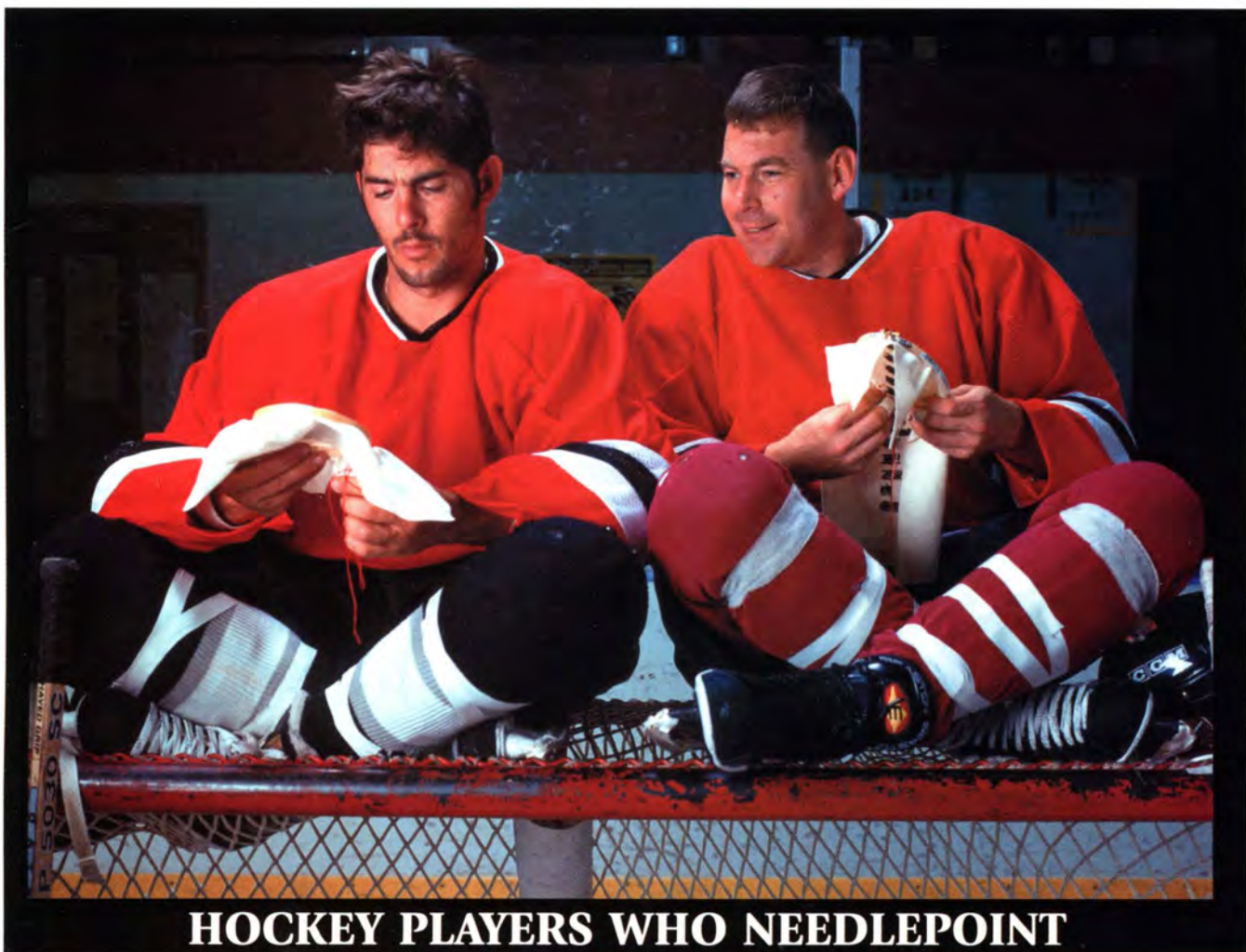
similar growth. According to Frost & Sullivan estimates, videoconferencing system sales will increase from \$0.8 billion in 2000 to \$1.8 billion by 2005; sales of videoconferencing services will triple, from \$1.3 billion in 2000 to \$4.1 billion in 2005.)

Taken a while

It has taken a while for videoconferencing of focus groups to take hold. Houlahan started the firm in 1990 with beta testing underwritten by General Motors and Ogilvy & Mather. Technology has improved as the prices of equipment and data transmission lines have fallen, making videoconferencing no longer solely a luxury for those in the boardroom. "When we started, we were transmitting at 128 kilobits per second," Houlahan says. "Today we transmit at 364 kilobits per second, which is near TV broadcast-quality, not only in the clarity and the pixel density and the refresh rate of the picture, which is what makes it clear and sharp, but the motion-handling. So instead of the moonwalk-like images we had 10 years ago, now a person can wave their arm and it will be a solid image."

It's been a long journey full of ups and downs but it appears the firm's tenacity is paying off. From a network of five focus group facilities in the U.S. with FocusVision installations in 1991, the company has grown to 233 facilities around the world. "You have to be willing to stay with it until the adoption level reaches the point where it

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