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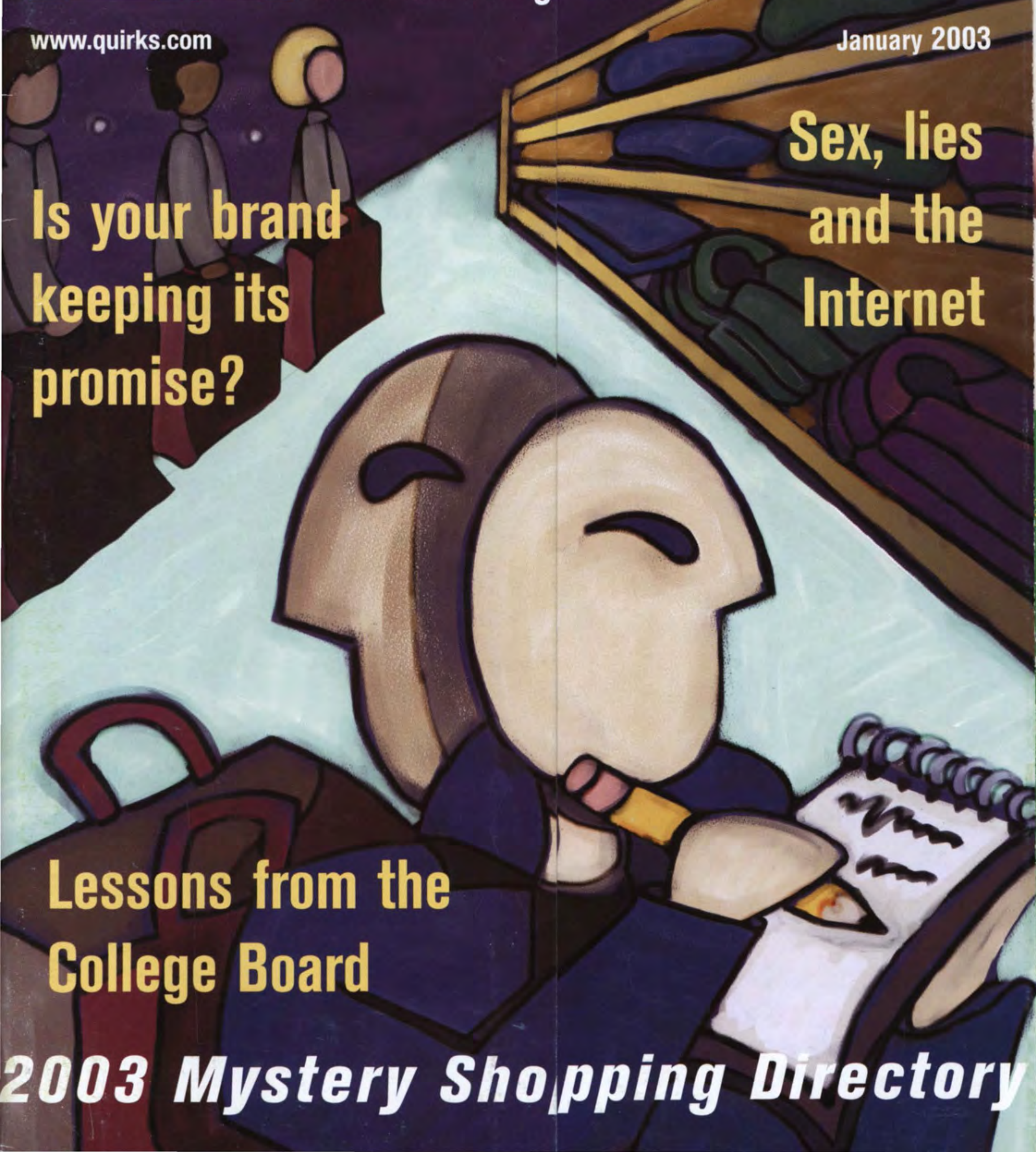
January 2003



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QUIRK'S Marketing Research Review

Volume XVII Number 1 January 2003

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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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Thumbs down on distracted drivers

A Maritz Poll from St. Louis-based Maritz Research reports that 90 percent of American drivers feel driver distraction (doing other things while driving) is a significant cause of accidents in the United States. Furthermore, almost one-third of the respondents (31 percent) reported they have gotten into or nearly gotten into an accident because they were distracted while driving. More men (34 percent) than women (29 percent) have gotten into or nearly gotten into an accident because they were distracted while driving.

While 90 percent of respondents believe driver distraction causes accidents, a large percentage still engage in driver distraction activities. For the most part, more men than women engage in these risky behaviors. Americans were asked if they "Never," "Rarely," "Sometimes," or "Often" engage in a variety of activities while driving.

Activities American drivers "Sometimes" or "Often" conduct while driving in their vehicles

Activity	All Respondents	Men	Women
Eat or Drink	45%	44%	46%
Talk on a Cell Phone	36%	39%	32%
Turn Around to Tend to Children	18%	16%	20%
Steer Vehicle with Legs	8%	12%	5%
Groom (put on make-up or shave)	7%	4%	11%
Read a Map	6%	8%	3%
Work on a Computer	1%	2%	0.4%
Read a Book or Newspaper	1%	1%	1%
Watch TV or Videos	1%	2%	0.4%

The findings are based on a random national telephone survey of 1,004 (501 male, 503 female) U.S. adult automobile owners.

According to the Maritz Poll, respondents who were previously in an accident or nearly in an accident because they were distracted while driving were still more likely to engage in driver distraction behaviors. These respondents were between 36 percent and 45 percent more likely to report that they "sometimes" or "often" engage in the following behaviors while driving: turning around to tend to children; talking on a cell phone; steering with legs; and, eating or drinking.

The findings further report that younger and middle-aged drivers engage in driver distraction behaviors more than older drivers. For the most frequent driver distraction behaviors, 18- to 44-year-olds engaged in the behaviors at fairly similar rates. However, those over age 44 reported engaging in those behaviors much less frequently. For more information visit www.maritzpoll.com.

Dollar stores garnering consumer attention

A study from Chicago-based Information Resources, Inc., "IRI Insights on Dollar Stores" shows that the $12.5 billion channel of trade has clearly arrived and shows no sign of slowing. Dollar store operators are aggressively working to broaden offerings, increase convenience relevancy, and match the deep-value premise consumers seek as economic uncertainty continues to loom. While dollar stores have often been characterized as the source for lower quality non-essentials, consumers prove otherwise, increasing their purchases of name brand food and health items in dollar stores. With one in five U.S. households now spending roughly the same amount on consumables in dollar stores as they do in club or drug stores, the competitive retail pool is deepening.

Key findings include:

• More shoppers and more frequent trips to the dollar store are driving the channel's double-digit growth. Dollar stores added three million new household shoppers in the past year. Shoppers of other channels like food, drug, mass, supercenter, and convenience were not immune to catching the dollar store bug as more than half of the heaviest shoppers in these channels also shopped the dollar store.

• Dollar stores continue to effectively home in on an important retail void, combining convenience and low-priced shopping options. Dollar shoppers have strong shopping opinions and differ from some conventional wisdom. Dispelling the myth of the trapped urban shopper, over one-third of the most involved dollar store shoppers like to store hop — half wish stores were open longer so they could shop at anytime. While on tight budgets, they also think shopping is fun and regularly seek convenient alternatives for traditional grocery and drug purchases. Dollar store shoppers are very deal-aware, easily switching brands for savings.

• Heavy dollar store shoppers are an extremely involved shopping group and are driving over 80 percent of consumables sales in the channel. Far from being an obscure minority of shoppers, roughly one

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Names of Note

FocusVision Worldwide, Inc., Stamford, Conn., has announced several management and personnel changes. **Peter C. Houlahan** has been appointed president and COO. **John J. Houlahan**, founder of FocusVision, continues as chairman and CEO. **Tom Myers** has been promoted to manager of U.S. and international sales. **Jack Campisi** has been named senior account director in sales.

Jonna Wisnieski has joined Businesslink, the business-to-business marketing and research division of Des Moines, Iowa-based *Marketlink*, as business consultant.


Wisnieski


Field

Fort Washington, Pa.-based pharmaceutical research firm *TVG* has named **Shelli Field** executive vice president.

Daniel Kahneman, Eugene Higgins Professor of Psychology and professor of public affairs in the Woodrow Wilson School of Public and International Affairs at Princeton University, was awarded the 2002 Nobel Prize in economic sciences. In its announcement, the Royal Swedish Academy of Sciences cited Kahneman "for having integrated insights from psychological research into economic science, especially concerning human judgment and decision-making under uncertainty." In a press release, Deborah Prentice, chair of Princeton's psychology department, said Kahneman has challenged the microfoundations of economics. "He has documented the shortcuts people take and the biases they have in making decisions. When people don't have a systematic way of making a decision, they do what they can, and that was news to psychologists and economists," she said.

Melanie Moses has been promoted to vice president at *Field Dynamics*, Encino, Calif.

Frances Germeshausen has joined Berkeley, Calif.-based *Greenberg Qualitative Research, Inc.* as senior project manager.


Germeshausen

Foresight Research, Inc., Troy, Mich., has named **Steven D. Bruyn** partner.

Christopher Wurtz has joined *Lindsay, Stone & Briggs*, a Madison, Wis., branding firm, as brand discovery planner. He will conduct brand research for clients.

Stephen Palacios will head the new New York office of San Francisco-based research firm *Cheskin*.

John Packer has joined *MarketVision Research*, Cincinnati, as research director focused on the travel and tourism industry. Packer is president of the Travel & Tourism Research Association.

Millward Brown Client Service Director **Corinna Streibart** has been named head of the new Millward Brown office in Hamburg, Germany.

Wander Meijer, managing director of *TNS Hong Kong*, will oversee the integration of the Hong Kong and Mainland China offices of Taylor Nelson Sofres and will ultimately assume responsibility for the operations and marketing of the merged offices. Working with Meijer is **Ashok Sethi** in his new role as managing director of TNS China, which he assumed on November 1st, following the relocation of former Managing Director **Susan Sabanos** to the U.S.

Separately, Taylor Nelson Sofres plc announced the following changes to its board. **Rémy Sautter** has been appointed as a non-executive director. He is currently chairman of Channel 5, the U.K. television company, and chief executive and chairman of RTL Radio, a French media business. He is also a non-executive director of PartnerRe inc, a global reinsurance company. Deputy Chairman **Nick Hodges**, who has been a non-executive director since 1997, retired from the board on December 31, 2002 and will be replaced as senior independent director by **Rob Rowley**, who joined the board in September 2002. **Jacques-Henri David**, who joined the board as a non-executive director in 1998, will step down on January 31. In addition, the chairmanship of each of the board committees has been reviewed and the following changes took effect from January 2: **Neil Cross**, former chairman of the nomination committee, became chairman of the audit committee. Rob Rowley has taken the position of chairman of the remuneration committee. **Stephan Buck**, former chairman of the audit committee, has taken over as chairman of the nomination committee.

NFO WorldGroup, Northwood, Ohio, has named **Frank Leinweber** director of NFO Automotive, its automotive sector research company.

Newton, Mass.-based food industry research firm *Gazelle Systems, Inc.* has named **Stephen M. Pytka** president and chief executive officer.

Microtab introduces XP 2003 edition

Atlanta research software firm Microtab Inc. has introduced its latest Windows-based software release, Microtab XP 2003, as well as an SPSS-compatible add-on module. The 2003 edition of Microtab XP updates both the Professional and Standard Editions by improving the banner generation function and the statistical testing capabilities. The SPSS add-on module for the 2003 Professional Edition works with any data collection software that outputs data in SPSS format. The module imports the data, the variable names, and the text for questions and their answers into Microtab XB. Once in Microtab, this module allows for one-button-click creation of tables. Means and statistical testing on the tables can be selected during import of the .sav file. The Standard and Professional Editions allow unlimited questionnaire length and unlimited table length on as many as 10 million surveys. The Professional Edition also includes sample balancing, statistical testing and data manipulation features. Both Windows Editions come with free support from Microtab, which also provides online searchable help and documentation. For more information call Larry Hills at 770-552-7856 or visit www.microtab.com.

New Market Insight reports from Cheskin

San Francisco-based research firm Cheskin is now offering three new Market Insight reports on its redesigned Web site at www.cheskin.com. The new reports are: Hispanic Trends; Designing Digital Experiences for Youth; and The Digital Experience Industry — Five Segments Focused on Youth. Hispanic Trends covers six interrelated trends in the U.S. Hispanic market that influence consumer decision-making. Designing Digital Experiences for Youth delivers recommendations for targeting the youth market. Both these reports can be downloaded for free. The 98-page digital experience industry report covers industry data in five segments along with company profiles of the top players. It can be purchased for $95.

SRC issues 2003 Latin American report

Miami-based Strategy Research Corporation (SRC) is now offering the 2003 Latin American Market Planning Report, the seventh edition of its annual reference book. The 2003 edition has been broadened to include new analytical sections to address a larger cross-section of readers interested in Latin American business and social affairs. It also includes added analytical content which will discuss the business environment, population and demography, buying power and consumer profiles. The new sections are based on primary and secondary research conducted by SRC in 16 markets. Compared to prior reports, the market profile of each country has been enlarged, and a consumer profile is presented for all countries for which primary data were collected. The report includes consumer confidence, consumer infrastructure, consumption patterns and lifestyle. In addition, the latest buying power estimates for 18 countries plus Puerto Rico and 70 metropolitan markets are presented in the new 2003 report. For more information call 305-649-5400 or visit www.strategyresearch.com.

Interface supports DASH CATI systems

Fort Washington, Pa.-based Marketing Systems Group announces the installation of a new interface between the Victoria B.C.-based DASH CATI system and the PRO-T-S *research*Predictive Dialer. DASH is a software package developed and sold in Canada. The new interface has already been installed at two facilities owned by Consumer Contact, a Canadian telephone data collection company. In addition to DASH, PRO-T-S also interfaces with CfMC Survent, Sawtooth's WinCati and The Analytical Group's WinQuery systems. Interfaces are under development with two more CATI systems and discussions are underway with other CATI vendors. For more information call Dan Bernard at 402-489-0000, or visit www.pro-t-s.com or www.dash.ca.

Report profiles TV viewers by technology ownership

A new report from Knowledge Networks/SRI allows clients to compare the media technology profiles for regular viewers of 31 major television networks — from NBC to ESPN to TLC. Derived from KN/SRI's surveys for The Home Technology Monitor, this analysis provides a resource for agencies, advertisers, media companies and financial analysts.

Based on overall technology ownership, homes that typically watch HBO have the highest index of home technology. Other networks whose viewing homes have high technology levels are Showtime, MTV, Disney Channel, Cartoon Network, VH-1, and TLC. The WB and UPN had the highest technology indexes among broadcast networks.

Technology Profiles of Network TV Audiences is designed to help users connect with consumers — such as high-tech early adopters — by identifying networks and technologies that are likely to reach these groups. The report covers 30 high-profile media

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Research Industry News

News notes

Salt Lake City research firm **RTNielson Company** has changed its name to **NSØN**. The name NSØN is derived from Nielson, which is the last name of company founder Ronald T. Nielson. The Ø is Scandinavian. The new name is pronounced "enn-son." RTNielson Company will continue to serve as the political research specialty brand for NSØN. The telephone number and Web address for RTNielson will remain the same. A new Web site will be launched for NSØN at www.NSONinfo.com. The new phone number for NSØN will be 801-983-NSON.

Taylor Nelson Sofres (TNS) has announced the integration of its Hong Kong and Mainland China operations. The amalgamation unites activities across offices in Hong Kong, Shanghai, Beijing and Guangzhou.

Acquisitions

The U.S. business unit of **IMS Health** has acquired New Hampshire-based **Marketing Initiatives, Inc.**, an information and services firm specializing in health care facility profile data.

New York-based **Arbitron Inc.** has acquired a license to the streaming audio audience measurement system and related assets from **MeasureCast, Inc.**, a Portland, Ore., company founded in 1999 to develop streaming audience measurement services for Internet broadcasters, advertisers and media buyers.

The transaction gives Arbitron a license to market and use the MeasureCast streaming audio audience measurement system as well as related technology used to produce streaming audience measurement services. Arbitron is also purchasing the "MeasureCast" trademark and other assets necessary to produce and maintain a streaming audience measurement service. Financial terms were not disclosed.

MeasureCast, Inc. will continue to develop technologies and services with its strategic partners, under a new and as-yet-unannounced name. MeasureCast partners, including Nielsen Media Research, NetRatings and Trans Cosmos International, retain certain rights to the MeasureCast services and technology.

Alliances/strategic partnerships

Chicago-based **Information Resources, Inc.** and **Vytek Solutions, Inc.**, have signed a co-development

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News spotlight

Asia-Pacific research industry at $2 billion

The marketing and opinion research industry in Asia-Pacific is worth $2.027 billion and represents 13 percent of the worldwide market for market research, according a global market research study from ESOMAR (The European Society for Opinion and Marketing Research). This compares to North America, which represents 41 percent of the worldwide market and Europe, representing 40 percent of the global market.

Due to the economic slowdown and to a faltering market in Japan, the Asia-Pacific market shrank by 4.8 percent from 2000 to 2001 when measured in U.S. dollars.

The largest market for market research in Asia-Pacific is Japan at $1.070 billion, followed by Australia ($249 million) and China ($193 million).

Singapore is the ninth largest market in the region with market research revenues estimated at $35 million. Singapore has the fourteenth largest population in the region and this means that the average per capita spending on market research is high for the region. This also reflects the fact that per capita GNP in Singapore ($25,000) is second highest in the region, coming only after Japan at $38,000.

Country	Revenues in U.S. $ million
Japan	1,070
Australia	249
China	193
Korea	108
Taiwan	81
Hong Kong	58
New Zealand	55
India	48
Singapore	35
Thailand	31
Philippines	24
Malaysia	23
Indonesia	13
Vietnam	7
Bangladesh	6
Myanmar	6
Pakistan	5
Sri Lanka	5
Cambodia	4
Laos	1
Other Asia	6
Total Asia	**2,027**

Expectations for the next five years (2002-2006) are for moderate growth at around 4-5 percent growth per year for the majority of countries. China, India and Vietnam will probably be above this level with Japan again not expecting significant growth (1 percent annually). It is estimated that the total market will grow from around $2 billion in 2001 to $3 billion in 2006.

Asia-Pacific is widely diverse with the two of the largest populations worldwide (China and India) at one end and some very small countries at the other end (Singapore and New Zealand).

Asia-Pacific also has some countries with the highest GDP per capita such as Japan, Singapore and Australia and some of the lowest (Cambodia, Laos, Myanmar). Asia differs from most other key regions because of this huge variation in both population and per capita income.

Asia holds around 60 percent of the world's population and forecasts are that this percentage will remain constant, though the total numbers will still grow rapidly.

However at present Asia only makes up 30 percent of world GDP but even by 2015 Asia is expected to increase its share of a greatly expanded GDP to around 40 percent obviously indicating a huge rise in per capita income and GDP.

Research Calendar

The Evaluation Unit of the University of Minnesota Extension Service will hold two-day workshops on conducting focus groups on January 13-14 and January 16-17. The sessions will be led by Richard Krueger. For more information call 612-624-2221.

The Minnesota/Upper Midwest chapter of the Marketing Research Association will hold a seminar on usability research on January 25 at the offices of The Leede Group in Minneapolis. For more information visit www.mra-net.org/chapters/minnesota.cfm.

The European Society for Opinion and Marketing Research (ESOMAR) will hold Technovate, a new technology and innovation conference, on January 26-28 in Cannes, France. For more information visit www.esomar.nl.

The Council for Marketing and Opinion Research (CMOR) will hold a second respondent cooperation workshop — "Protecting Our Assets II" — on February 3-4 at the Radisson Parkway Resort in Orlando, Fla. For more information visit www.cmor.org.

Britain's Market Research Society will hold a conference entitled "Challenges and Opportunities in Public Policy Research" on February 12 in London. For more information visit www.mrs.org.uk.

The Great Lakes, Chicago and Florida chapters of the Marketing Research Association will hold their annual conference on February 13-14 in Cancun, Mexico. For more information visit http://glcmra.org/events.htm.

The European Society for Opinion and Marketing Research (ESOMAR) will hold Global Healthcare 3, its global health care marketing research conference and exhibition, on February 23-25 in New York. For more information visit www.esomar.nl.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its fragrance research conference, themed "From Consumer Insights to Winning Fragrances," on March 16-18 in Lausanne, Switzerland. For more information visit www.esomar.nl.

Britain's Market Research Society will hold its annual conference on March 19-21 at the International Convention Centre in Birmingham, England. For more information visit www.mrs.org.uk.

The Southwest, Southern California, and Northern California/Pacific NW chapters of the Marketing Research Association will hold their annual Las Vegas conference on March 19-21 at Treasure Island Hotel and Casino. For more information visit www.swmra.org.

Qualitatively Speaking

What are they really saying?

Connotation and denotation in qualitative research

By Robert J. Morais

Editor's note: Robert J. Morais is chief strategic officer at Carrafiello Diehl & Associates, an Irvington, N.Y., advertising agency. He can be reached at 914-674-3968 or at rmorais@CDAmail.com.

In a recent focus group on toilet bowl cleaners, my colleagues and I were stupefied when user after user left one of the primary benefits of their regular brand off of their list of most important brand attributes. This benefit, "leaves the bathroom fresh," has been a centerpiece of communication, supported by millions of media dollars, for every toilet bowl cleaner brand these users bought. They certainly talked about how clean their toilets were, so why did they not mention the benefit that we — and our competition — felt was so important?

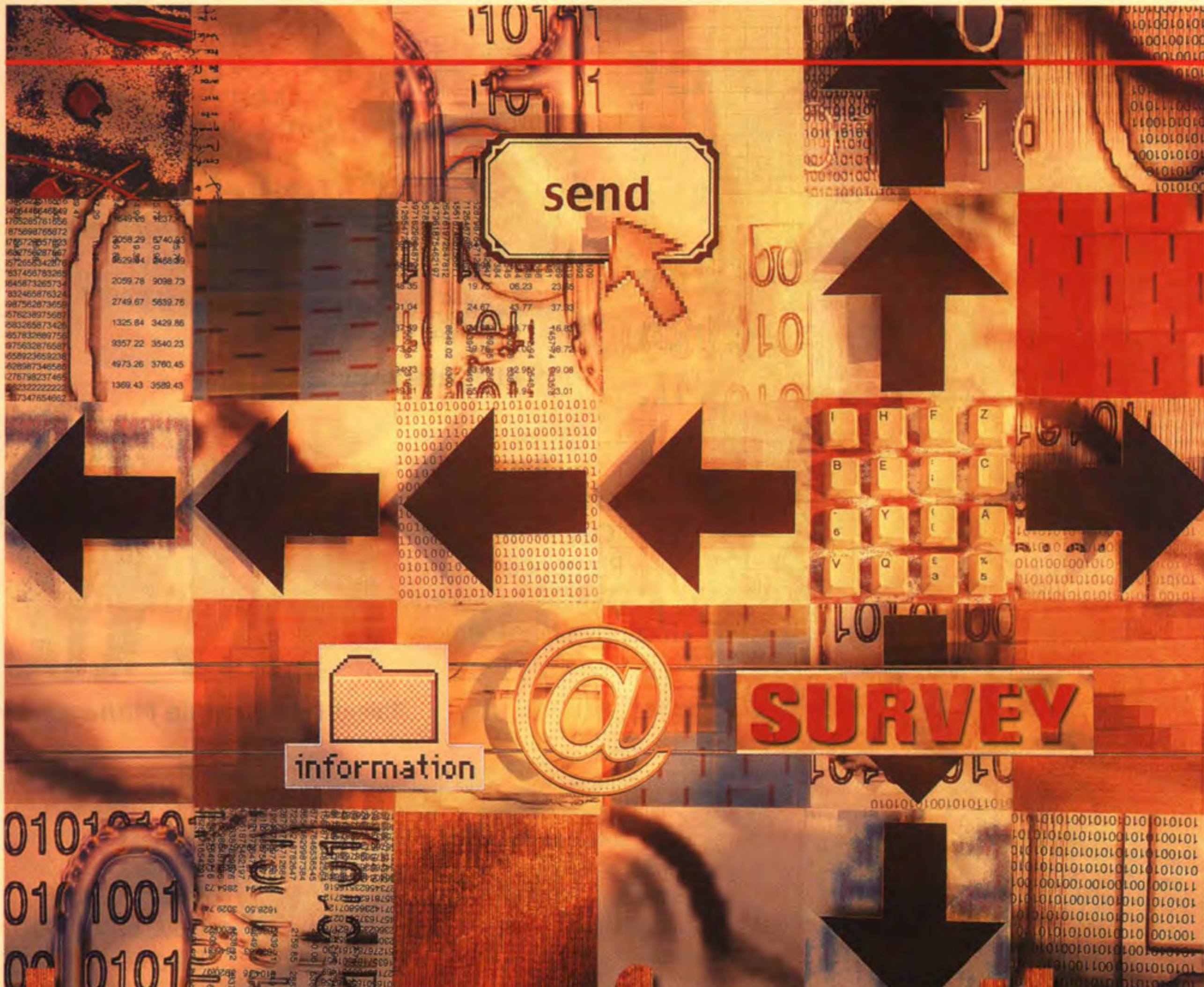
It struck me that those of us in the back room, along with the moderator, were being too literal in our interpretation of what we heard. In fact, we were not interpreting at all. We were taking the respondents' words at face value — the denotation — and missing the hidden meaning of their words — the connotation. We needed to explore the possibility that "clean" not only meant free of dirt but also fresh smelling. The benefit of "leaves the bathroom fresh" may have been expressed indirectly by respondents with a single word that held several meanings for them but only one for us marketing professionals.

Denotation is the literal meaning of a word; connotation is a word's broader, symbolic, often more suggestive, meaning. The word "Thanksgiving" denotes a holiday on the calendar; its connotations are vast: a gathering of family and friends; a day to appreciate all that we have; permission to overindulge in food; a time to reflect on our national history; long, traffic-clogged trips on the highway; college football games, etc. The same can be said for virtually any word, or any benefit, uttered in a focus group. When we take a word at its literal meaning, we can miss critical information. We can make mistakes. On the other hand, sometimes we can learn a thing or two.

A number of years ago, I was involved in observational research for a well-known floor cleaner. We pre-recruited women who were willing to have marketing and advertising types in their homes watch them use our product in their natural habitat. So far, so good. The problem arose when our respondents removed a generic version of our brand from their cupboard and referred to it without hesitation or apology as our brand. Even after questioning, with the generic right before their eyes, respondents used our brand name! We realized that, despite all our advertising, we had not done a sufficient a job of separating ourselves from competing knockoffs. Consumers were connoting brand meaning from a generic look- and sound-alike. Our recruiting mistake — assuming that when they said they used our brand they meant our brand — actually led to valuable learning.

We all know that words can have multiple meanings, a function of the user's personal definition and/or the context in which a word is used. But the design and pace of many focus groups precludes the kind of probing that will reveal what respondents are really saying. A question is asked, answered by respondents, followed up with a related question, and so on. And, yet, in light of the example that began this essay, we cannot afford to skim the surface of respondent commentary. We should stop and examine key words and phrases. We should conduct "semantic chains" in which we work with respondents to list synonyms, building an on-the-spot thesaurus that will open up new conceptual venues, stimulate discussion and generate insight.

Qualitative research on a brand is much like the connotation of a word. It adds texture and meaning that eludes more denotative quantitative research methods. The deeper we probe connotation, the more certain we can be that we understand what our respondents are really saying.



Lessons from the College Board

For maximum respose rates in online surveys, keep respondents in mind

By Frank X. Allen

Editor's note: Frank X. Allen is a Chicago-based information technology and business writer.

Market researchers are increasingly turning to the Internet to collect information, often in the form of online surveys. As the College Board found out, to achieve the best results, surveys should keep in mind the needs of respondents.

The College Board, a national, non-profit association best known for creating and sponsoring the SAT college entrance exams, completed a highly successful online survey of 3,200 admissions officers at colleges and universities across the country. The results of this survey were published in a white paper titled "Trends in College Admissions: A Report of a National Survey of Undergraduate Admissions Policies, Practices and Procedures."

Working with Thomas Technology Solutions, Inc. (ThomasTech), a Horsham, Pa.-based systems integrator that provides content management and electronic publishing solutions, the College Board delivered a survey that:

- combined paper- and Web-based versions produced from a single source;
- accommodated virtually all browsers;
- let respondents save a partially completed survey for later completion;
- included a "send" button to alert the College Board about completed surveys;
- ensured security of data; and
- provided around-the-clock access to phone support.

Combine paper- and Web-based versions

It may sound contradictory, but to get the best results from a Web-based survey, combine it with a paper-based version. That's the advice of Renee Gernand, senior director of guidance services for the College Board, and John Mullen, vice president of information services at ThomasTech.

Of the 3,200 admissions officers who received the survey, more than 1,400 (43 percent) completed it. The combination of paper and online was key to that high rate of response. "People like to see the survey first before they go online," says Gernand. "They want to know what they are getting into."

Having the survey on paper allows respondents to review the questions, collect information, and estimate how long it will take them to complete the survey. "Providing the survey on paper and online also gives respondents a choice, which makes them more likely to cooperate," says Mullen. In the end, fully two-thirds chose to complete the survey online.

The College Board survey began with mailing paper copies of the survey. In a cover letter, the admissions officers were invited to take part in the survey and were given the choice of completing the survey on paper or online. "We designed the Web site so that it would mimic the paper version," says Mullen. Because the Web-based survey looked like the paper version, respondents were less likely to be confused and more likely to complete the survey online.

Of the 3,200 admissions officers who received the survey, more than 1,400 (43 percent) completed it. The combination of paper and online was key to that high rate of response.

But getting an online version of a survey to look like the paper version can be a real challenge. There are many different Web browsers in use and each browser has different capabilities.

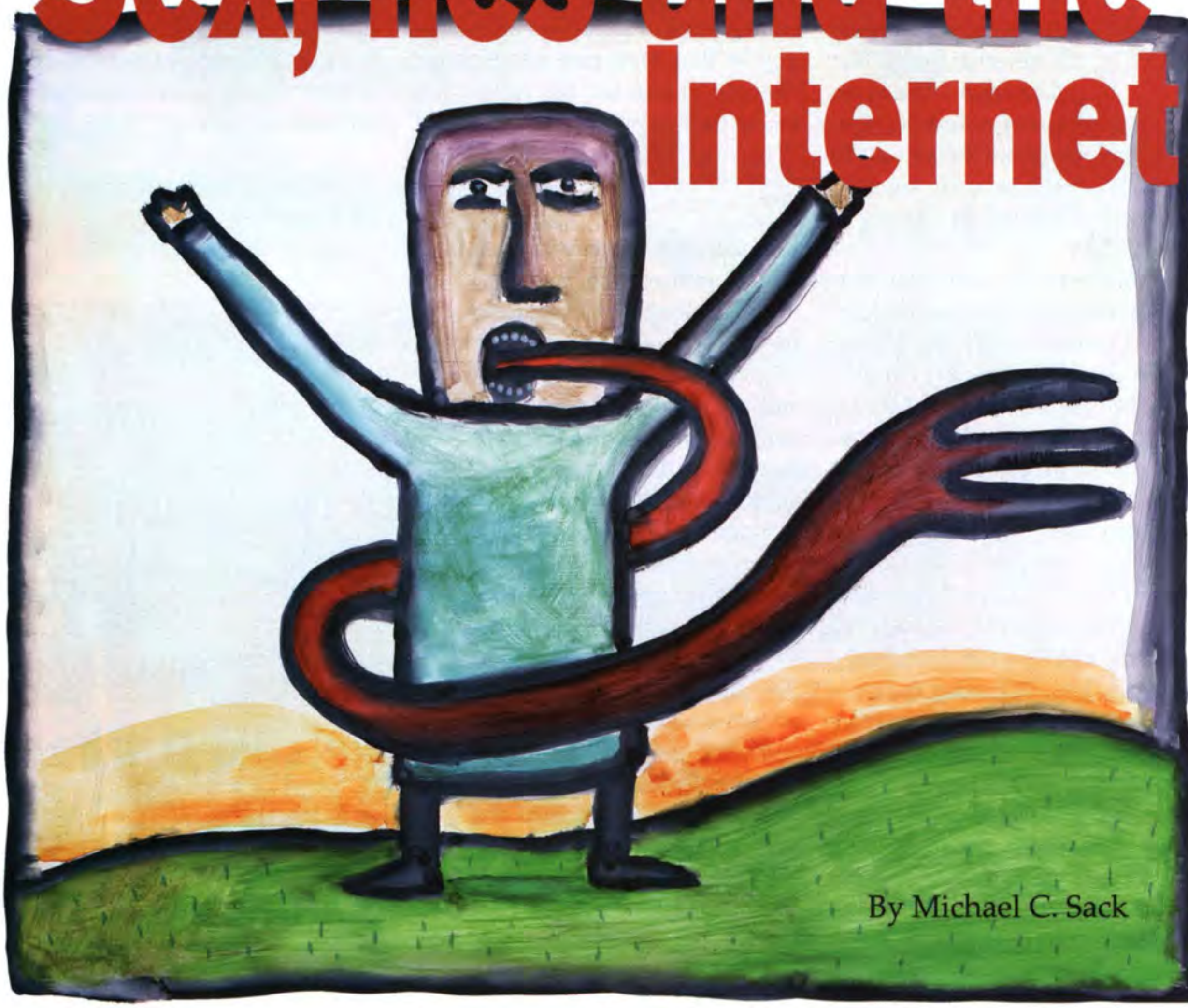
When developing a Web survey site, be sure to ask your developer about the browsers your customers may use. Gernand was surprised by the number of different Web browsers — some of them quite old — used by colleges and universities. That made it crucial to design the College Board survey Web site in such a way that it would accommodate all potential users' browsers. "Unfortunately, handling this variety of browsers cannot be done with an off-the-shelf Web development application," says Eric Jacobs, systems analyst at ThomasTech. "We had to do a significant amount of server-side coding to accommodate the different browsers."

Let respondents save partially-completed survey

One of the biggest problems with online surveys is that respondents abandon the survey partway through. At 16 pages in length, the College Board survey was long enough to require special consideration. The reality of the College Board survey was that numerous people needed to provide input. In response to this need, ThomasTech designed the Web site so that the respondents could fill out part

continued on p. 60

Sex, lies and the Internet



By Michael C. Sack

Minimizing the liar factor

Editor's note: Michael C. Sack is president of Image Engineering, Inc., a Goshen, Ky., research firm. He can be reached at listening@imageengineering.net or at 502-228-1858.

A few decades ago, a couple of researchers named Masters and Johnson began researching an aspect of human behavior that is considered both very important and very personal. They asked men and women straightforward questions about sex.

When they examined responses by gender, Masters and Johnson noticed that men reported much more frequent sexual activity than did women. The results suggested only two possible conclusions — the men either weren't supplying straight answers, or else they weren't engaging in "straight" behavior!

The continuing challenge for researchers in the field of human sexual behavior is to minimize lying and to quantify the "liar factor," so researchers can estimate actual behavior.

What does this have to do with the Internet? Everything. We're talking about the medium that gave rise to chat-room alter egos and e-mail urban legends. Falsehood and pretense are as much a part of the online fabric as "www." So, before we hail the

Internet as the greatest advance for researchers since statistics, we need to learn how to minimize lying and to find better ways to estimate actual behavior.

My recent research shows that respondent lying about Internet activity may be far greater than most people think. It not only applies to market research collected on the Internet — it pertains to market research that has anything to do with the Internet. Why? Because Internet activity, like sexual activity, is private behavior that deeply impacts one's sense of personal significance. Because the subject is considered important, respondents strongly desire to see themselves (and to be seen by others) in the best possible light. This makes self-reported information highly susceptible to misrepresentation.

The case of the lying respondents

An example of this tendency, and some ideas about what can be done to counter it, can be seen in the case study of awareness-and-usage research for an e-business begun by an established, catalog-based health-and-wellness company.

The company commissioned a tracking study to examine the impact of advertising on awareness and use of its Web site. The target market was women, ages 30-60, who use the Internet at least one hour a week, who have searched for health-related information on the Internet, and who have positive health-related attitudes and behaviors.

In the first wave of research, fielded in September 1999, several firms were used to recruit more than 500 participants by phone for a central-location study fielded at 10 sites nationwide. In addition to answering qualifying questions, recruits also passed a standard security screen to ensure that they and their family members were not employed in jobs related to health, medicine, marketing research, journalism or the Internet.

Qualified participants were invited to come to the research facility, where they were re-screened before admission to the study, which included group discussion and a computer-aided interview.

At the research facility the first liar factor surfaced right away. More than 10 of these "regular Internet users" didn't know how to use a computer mouse. Another 70 demonstrated insufficient computer skills to take a computer-aided interview.

At the beginning of the computer-aided interview, the security questions were repeated again. This time another approximately 80 participants altered the answers they had given twice previously during screening. Most often this "misreport" was about medical professionals in the family.

At this point, the usable pool of recruits had dropped from more than 500 to 355. But the misrepresentation continued. During the computer interview, a third of respondents reported spending 30 minutes or less each week on the Internet (vs. the hour-per-week minimum required to qualify for the study). Overall, of 355 respondents, 235 provided at least one set of inconsistent responses.

During the in-person interviews which included group discussion, the moderator noted that participants' comments were "punctuated by hyperbole." Respondents also expressed themselves with two different vocabularies. When speaking generally about the Internet they used a "social" vocabulary derived from the media. But when they discussed their own Internet usage or evaluated specific Web sites, they used a separate, "private" vocabulary devoid of industry jargon. Terms like "navigation," "portal" and "load speed" disappeared.

A second wave of this same research was also conducted. This time, recruiters screened potential participants with stricter, more focused questions about computer usage and skills. Still, about 20 percent of qualified respondents were lost for security or insufficient skills (down from 33 percent in Wave 1).

During the second wave, the "outing" of those with insufficient skills took a humorous turn. Participants made excuses to leave the room — and never returned! Internal inconsistencies declined, but they were still found in 50 percent of responses (down from 66 percent in Wave 1).

What the lying suggests about consumers

These results provide a useful perspective on consumer values. Most people welcome technological advances, but those advances outpace people's ability to keep up, in terms of both time and finances. Nevertheless, people desperately want to view themselves as technologically up-to-date. To see themselves otherwise would be to succumb to "techno-aging," public acknowledgment that the world has passed them by. Psychologically, this acknowledgment can be considered a form of social "death."

So, consumers do their best to keep up, and do even better at convincing others that they keep up. Because the behavior is private, creating a tech-literate persona is easy. All it takes is the ear to develop a limited technical vocabulary (such as the one selectively practiced by respondents during the group discussions).

When people exercise a persona long enough, they can easily convince themselves that their public face is their true identity. This can lead to an unwitting overestimation of skills and experience.

But there's another reason people might misrepresent themselves to survey researchers: an easy opportunity to acquire skills or to have a technology-related experience. It's a learning opportunity where the student actually gets paid to participate!

What the lying suggests to researchers

The case study reveals several valuable points for researchers. First, *know the susceptible categories. Researchers should show special care in dealing with products and services* that are privately consumed, yet closely linked to self-image. When consumption is usually not observed, consumers are easily able to create an image for others.

Second, be as specific as possible in screening. Focusing on details in screening not only provides better information, but it also communicates that the researcher considers accuracy to be important.

Third, don't be afraid to repeat important questions. If we hadn't asked questions three times, we wouldn't have had some substantial security breaches. When repeating questions, varying the data collection method used can be helpful. It can also be helpful to re-screen after respondents believe they have successfully bypassed the screen. In our case study, several may not have expected the computer to "catch" their disqualifying response.

Fourth, use internal consistency checks. Often, researchers set up surveys to disallow inconsistent responses. Instead, consider allowing inconsistent responses, building in a mechanism to clarify responses. This preserves your clean data while also providing a measure of the degree of inconsistency of each respondent. When a respondent provides too many sets of inconsistencies, drop him or her from the data set.

Fifth, plan for the liar factor. Gather more sample than you need, and be willing to invest in the process of weeding out those who misrepresent themselves. If you don't feel the freedom to throw out bad responses, you're likely to be an accessory to the crime.

Sixth, be careful when using socially-oriented forms of data collection. Phone interviews and personal interviews can be great for the right applications, but when respondents are concerned about how others perceive their answers, it may be better to ask via computer or paper-and-pencil. The more truthful responses in our case study came via computer. (This actually bodes well for Internet surveys!)

Seventh, monitor interviews and use personal observation whenever possible. By using computer-aided interviewing in a central-location study, we were able to confirm that self-described Internet users really knew how to use the Internet.

Eighth, use non-traditional data collection methods to bypass defenses. Many techniques require researchers to trust the veracity of respondents. Projective techniques bypass conscious defenses to access information that respondents may not be aware of. I often collect data using visual images, which contain symbolism that goes far beyond respondents' conscious reasoning.

Ninth, use tracking. No matter how careful you are, you are still going to have some misrepresentation coming through. While measuring actual activity can be difficult in such an environment, measuring change in activity is much easier. If the liar factor remains relatively consistent from wave to wave, incremental changes should be relatively accurate measures.

A final warning

If you read through the above case study saying to yourself, "My Internet respondents aren't like that; I can trust them," you are especially susceptible to the liar factor. Give your respondents the opportunity to lie (and be caught) and see how they do. Then arm yourself with tools to minimize misrepresentation. In the end, you will gain a better understanding of your consumers — whether you're dealing with Internet research, sexual behavior research, or any product category that's consumed in private.

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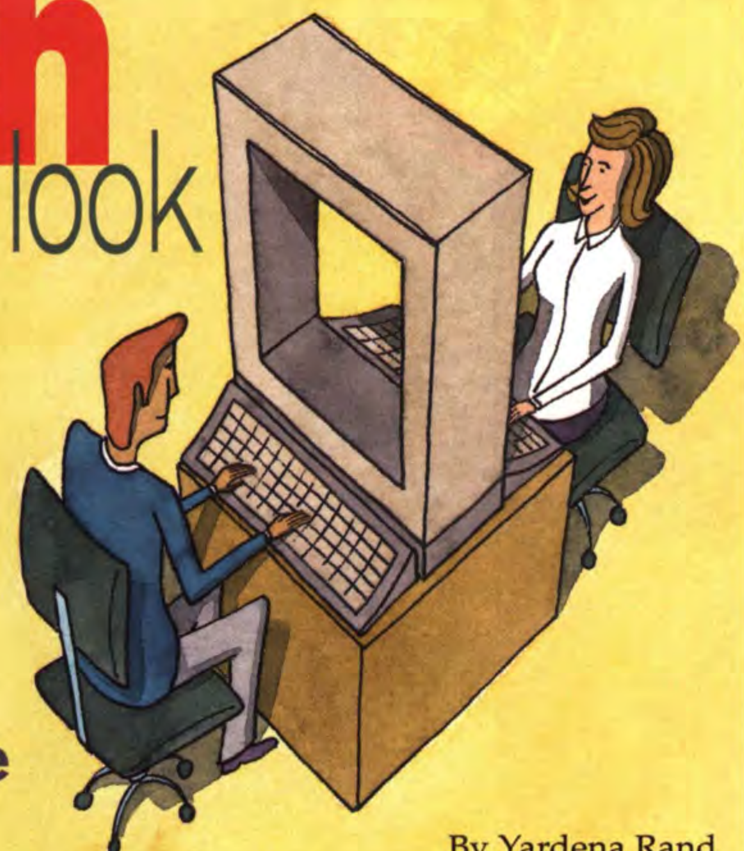

Revisiting online focus groups

By Yardena Rand

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Many market research users are skeptical of online qualitative research. Some widely-held suspicions include the following:

• Artificiality. Many feel the medium is impersonal, that the interaction between the moderator and respondents as well as the respondents amongst themselves is artificial. Without the intimacy fostered in an in-person environment, many feel they can't get good, in-depth information.

• No body language. Many believe reading body language is an important part of the research process. After all, posture, gestures or the raise of an eyebrow can all be evidence of resistance or buy-in. Without the ability to see respondents, many feel they miss important nuances.

• Limited scope of the moderator's guide. Another belief is that in an online environment moderators can only ask questions, not have respondents complete exercises or participate in interventions. As such, the argument goes, the researcher cannot dig for more valuable underlying information.

But online focus groups are not simply a poor man's alternative to the traditional in-person format. Certainly, there are research objectives that necessitate in-person focus groups, such as when you want to watch respondents examine and use a new product, for example. But our online focus group clients have been surprised to find their overall suspicions unsubstantiated, particularly with respect to the issue of gathering in-depth information. For several reasons, moderators are often able to dig even deeper in the online environment (assuming respondents are Internet savvy and comfortable using a keyboard).

• More information from each respondent. With in-person groups, respondents can only speak one-at-a-time, often limiting the amount of information that can be gathered from any one respondent (especially the shy ones). In the online environment, you

hear from everyone on all questions because respondents reply to questions simultaneously. You also have the option to send private messages to each respondent, so you can essentially have one-on-one conversations. This allows the researcher to maximize the quality of information gathered, as well as minimize the influence of any one participant.

• Efficient conversation. By having to type their responses, there is also less of a tendency for respondents to babble; they get right to the point. Using private messaging or probing the group as a whole, the moderator can gather additional information where necessary. Private messaging has the additional advantage of allowing the moderator to question respondents on areas that may be somewhat tangential to the conversation without interrupting the flow of the group overall.

• Many techniques for gathering information. Online focus groups give you the ability to conduct mini-surveys, with results available immediately. This allows the moderator to ask quick questions for a read on attitudes, purchase plans, etc. to help guide and focus the conversation. Many interventions can also be run — photo sorts, rankings, exercises (e.g., sentence completion, filling in grids). In addition, respondents can evaluate materials via the Web (such as marketing campaigns, new product concepts, feature sets, etc.).

• The online environment reduces inhibitions. Personalities and opinions come through in the online environment. At first glance, the Internet would seem to be impersonal — how can you foster collegiality when there is no face-to-face contact? But the anonymity actually helps make respondents feel more relaxed and fosters intimacy — and that comes through very clearly. Respondents interact freely with each other and, even though you can't see their faces or postures, make their opinions known. If they feel passionately about something, you will know.

• True partnership between client and moderator. The client and moderator are in constant contact throughout the group (both online and over the phone). This assures that client questions are covered and that probes target truly relevant information. Most importantly, information exchange is immediate — no more note-passing or waiting for the last few minutes (when the moderator exits the room to get last-minute questions before letting the group go).

Additional advantages

And yet, the benefits of online focus groups are not limited to the type of information gathered. While maximizing the ability to question in-depth, online focus groups offer additional advantages.

• Speed. Groups are completed more quickly because no one has to travel. Rather than covering three cities in two weeks, you can do it in one. Transcripts are also available right away — they can be downloaded easily at the end of each group, so no more waiting three to five business days for transcripts. These benefits greatly accelerate the research process. Rather than the six or seven weeks it takes to complete in-person focus group projects, online groups can be completed in four to five weeks.

• Recruiting flexibility. Because groups are held online, respondents can be drawn from a wide geographic area (e.g., regionally, nationally, globally). This lets researchers cast a wider net for recruiting from hard-to-find populations, and allows for focus groups with geographically dispersed populations.

Time to revisit

If you have dismissed the idea of conducting focus groups online in the past, now is a good time to revisit that decision. Not only have online "room" facilities improved and many moderators honed their online techniques, but given today's tight economy and travel anxiety, online focus groups allow you to conduct viable qualitative market research while saving money and avoiding travel. [Q]

Internet surveys: limits and beyond limits

By Cristina Mititelu

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Internet surveys are becoming more and more popular among market researchers. The benefits they offer can no longer be overlooked: cost efficiency, field speed and a variety of media testing options.

Of course, there still are debates about what works and what doesn't work but some of the methods and techniques applied on the Internet have been tested and validated.

We know now that Internet surveys can be successfully used only on certain targets and in some specific types of studies where the research universe coincides with the Internet population.

Nonetheless, one of the greatest benefits of the Internet is its applicability in terms of multi-media research. Copy tests have practically been revolutionized. Several other kinds of studies are now run on the Internet, the most common of which are: employee studies, concept and product tests, customer satisfaction and business-to-business studies.

Data quality in Internet-based research

Issues like sampling representativeness and response rates are always raised when discussing Internet-based research.

There are two main sampling options one can choose when running Internet surveys:

• quota samples, which are a form of non-probability samples;

• probability samples — random, systematic samples in any sampling scheme, stratified or structured, as in offline research.

Most online surveys use quota

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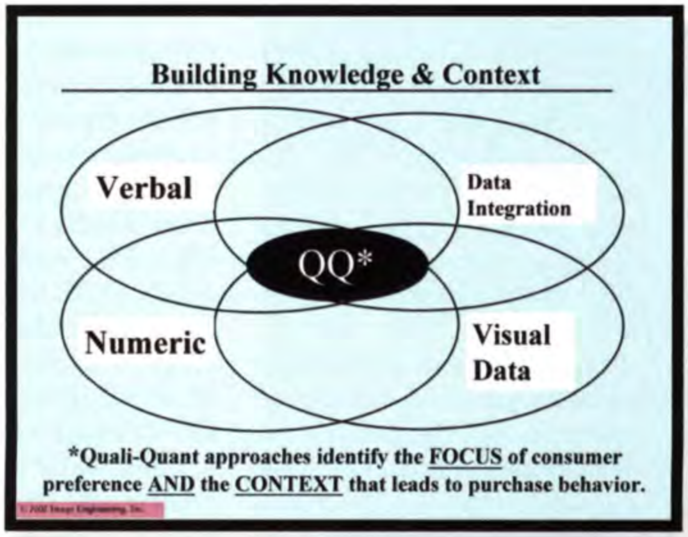

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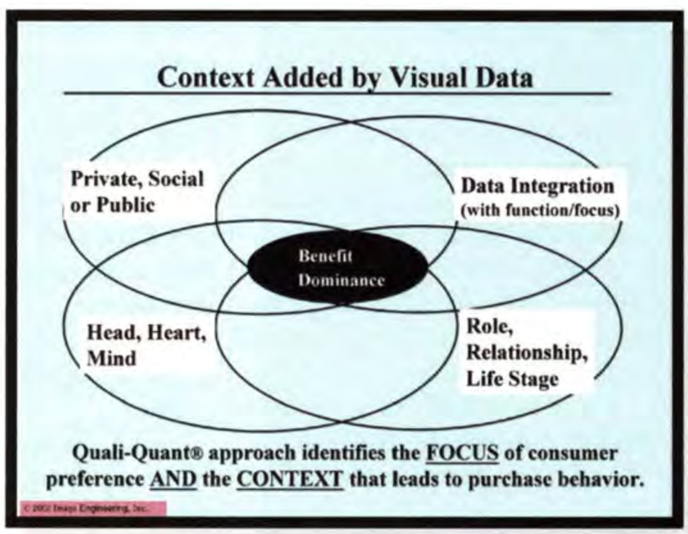

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samples, largely used because the Internet is a medium that can reach special targets where offline research proves to be expensive and less efficient: managers, telecom employees, early adopters, etc.

Quota samples are used when there is little known about the structure of the universe and when the researcher may want to interpret the findings in the light of certain different categories relevant to the study, purposely predefined by the researcher and of course under the subjectivity of the researcher.

Unfortunately, the Internet universe is not a good sampling framework for one reason: no one can have the full list of e-mail accounts in order to make a random selection. Even if this were possible, ethically this is out of question; there are very strict regulations toward data protection. This is why most Internet samples are a combination of availability sampling with quota sampling.

Probability samples are used when you want to apply the findings to a population whose characteristics you already know. Probability samples in any of their forms are the ones we question for representativeness. The issue always raised is "What is the sample representative of?" Is it the Internet population or is it the population of Sweden, for instance?

It can be easily said that the sample used in an Internet survey is representative of certain criteria but this is not enough to have reliable data.

Where there is a perfect match of offline population and Internet sample on background criteria it is very likely that the Internet population and therefore the Internet sample have a common trait that induce biased responses on several variables.

If the random samples are biased, weighting can be a balance option for many researchers. When the biases are great, weighting is a questionable procedure. Weighting cannot replace a good selection of sample and it cannot correct a sample if the selection was inappropriate.

What happens when response rates are low? In such cases the data are susceptible to invalidity. Data from both quota samples and random samples is at risk.

Key aspects

Here are a few key aspects to take into account in order to collect accurate data:

• Work with good Internet panels. This is a rule that concerns both random samples and quota samples. What does "good Internet panel" actually mean?

a. The recruitment in a panel is very important. There are two types of panels: access panels and opt-in panels. Opt-in panels are those where the respondent did not reject the idea of being contacted in the future in order to take part in a survey or some other form of research. Access panels rely on respondents' agreement to take part in future surveys on a regular basis. Access panels are more difficult to maintain but turn out higher response rates, 35-75 percent, while the opt-in panels result in only 5-10 percent response rates. It is always helpful to ask in the establishment survey for information about Internet connection: connection type, ability to view movies and other multimedia insertions with high fidelity. This is essential in copy tests.

b. Panels are a good resource if they have been randomly selected from a universe that we want to investigate.

- Use precise sampling selection and sampling methods of panels and samples.

- Send reminder invitations to increase response rate as much as possible.

- Apply correction tools in case of high non-response rates. Any inference from a biased sample to a population is susceptible to huge error.

Market researchers should constantly make the clients aware of the limitations of the Internet. The ultimate way to understand the comparability with the offline research is to run in parallel the same questionnaire using both offline and Internet surveys.

A few practical things to take into account when deciding to run online surveys:

• Use the right software or a programming solution for the implementation. Some of the available software is limited, some is very flexible. The flexibility lies in the capability to handle multimedia insertions, multiple validation options, etc. The software must also support large databases.

• Use a powerful provider. Simultaneous entries can crash the server that hosts the online survey. This is why you must know the capacity of the server and send the e-mail invitations in batches if needed.

• Test the questionnaire in several browsers and resolutions.

• Details are important in online surveys. The way the invitation letter, the reminder and the subject are phrased is essential. Information on how the information obtained in the surveys is handled makes the respondents confident and increases response rates.

• Conduct a pretest. This is a stage of the research that few would skip in offline research. In many instances, the Internet is the last research option because the findings are needed as soon as possible and there is not time to conduct an offline survey. A pretest would disclose some of the programming errors.

Trends in Internet surveys

The latest developments in Internet research are very client-oriented and are technological rather than methodological. We have seen the emergence of many specialized companies in Internet-based research. Most of them have the logistic tools to deal in the Internet medium but have no knowledge in terms of methodology of marketing research.

When working with Internet research agencies it is essential that you not base your choices on purely technical services (questionnaire programming, hosting and server availability, panel availability and data processing capabilities). It is equally important to demand that the Internet research agency understands the purpose of the study and that they are able to select the sample rigorously and give you methodological details that help you understand if the data collected via Internet is valid.

Here are a few of the trends in Internet-based research:

• Total transparency. The current tendency is towards total transparency to the client. This means that the client agency can monitor the time/times of the e-mail invitations and the questionnaire completion status. In addition, the drop-out rate, the number of completed interviews, pending interviews, interrupted interviews, the total e-mail invitations, etc., are all available in graphical representations from some Internet-based research agencies.

• Less use of cookies. The use of cookies turned out to have a few disadvantages: respondents whose PCs were cookie-disabled could be interviewed twice. The respondents had to be warned about the insertion of cookies and the response rates dropped dramatically due the well-known reluctance towards cookies. The new respondent identification techniques do not rely on cookies, are much safer, and do not admit multiple interviewing of the same respondent.

• History options. This new identification technique allows history tracking. What does identification mean here? This means that the respondents are associated to unique serial numbers. This helps the data processing analysts to check for possible multiple questionnaire completion by the same e-mail account holders. The history option permits a respondent who started the questionnaire but interrupted it for different reasons to restart the completion right at the point of interruption.

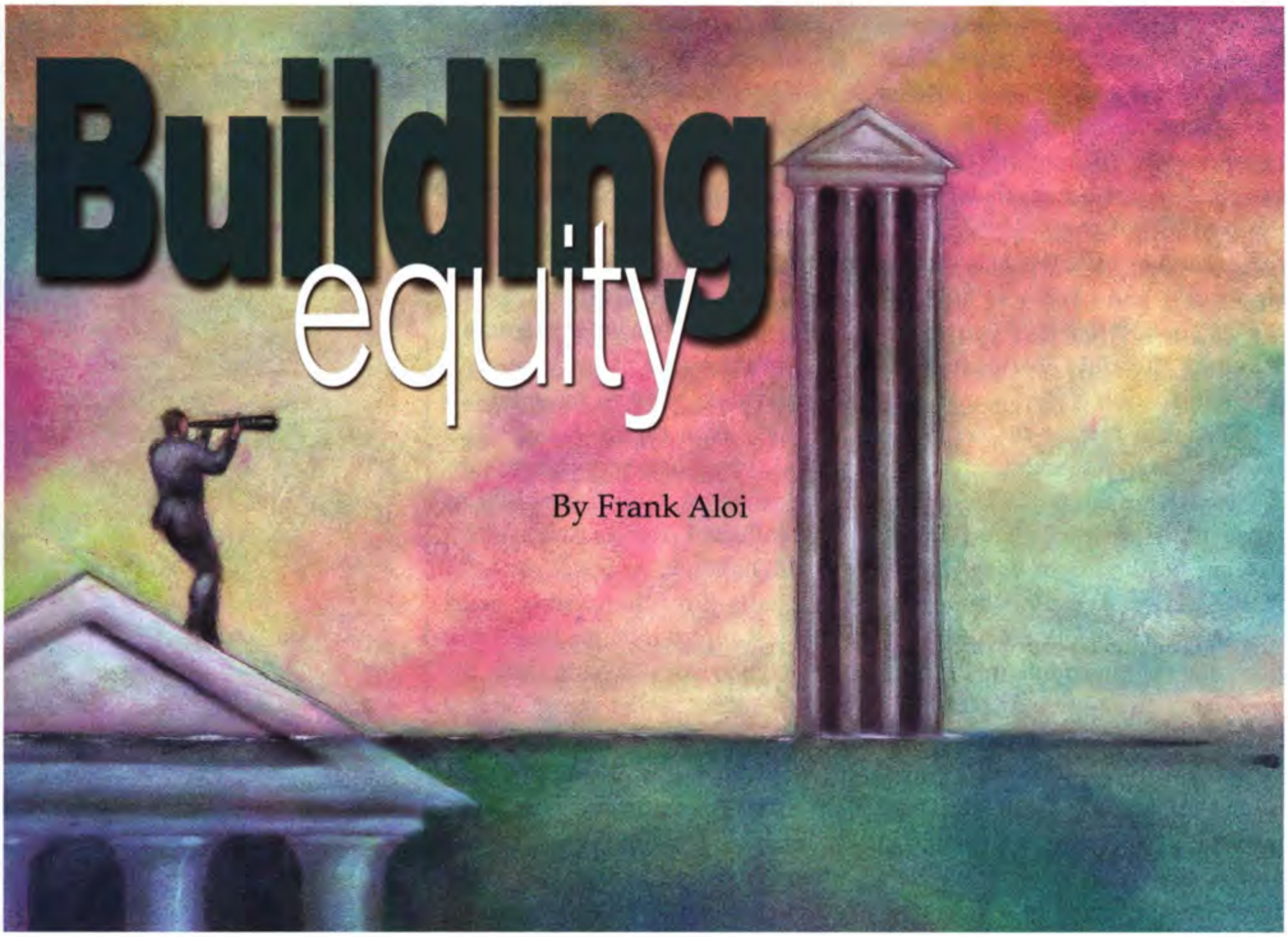
• Real-time distribution of responses. This can be found as a separate module of the Web survey software or as a complementary service from the company that hosts and implements your survey. Client companies want more and more to have field control at any survey stage. Sometimes this is detrimental to the way the data collected online are analyzed and interpreted. Internet data need to be validated and only then reported and interpreted. Few such services or software programs apply corrections on data collected from biased samples or with high non-response rates.

• Media protection. Since many copy tests are run on the Internet, it was compulsory to guarantee the security of the media shown. In pre-tests, run before campaigns are launched, one big demand of the advertising agencies but also of the campaigns' beneficiary is that creative ideas and messages remain secret. Following the pressure of the clients, especially advertising agencies, there has been real progress in terms of preventing media download or media copying.

• Reception accuracy. The size of the commercials was reduced for better reception and upload speed without diminishing the quality of the sound and image.

Much to be debated

With online research, there is still much to be evaluated and debated in terms of non-response analysis, sampling and research methodology. Nevertheless, the value of the Internet as a research tool is clear. Yet Internet research is still insufficiently exploited. It is important for market research agencies to make clients aware of the limits of online research in addition to the uses of the Internet as a complement to offline research.



Building equity

By Frank Aloi

Mystery shopping strategies for the financial services industry

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The Tyco scandal, the Enron collapse, a 40-year low in the federal funds rate, a squeamish stock market, depressed retail sales, and plummeting consumer confidence — so how do banks increase sales and enhance current relationships in such erratic, untrusting markets? By providing all of their customers and potential customers with consistent, service-oriented, knowledge-filled interactions and confident employees. In a nutshell, by strengthening their corporate culture.

So what does a mystery shop program have to do with the corporate culture of a financial institution? Well, if you are currently mystery shopping and you do not know the answer, then your program is not working for you as it should be.

In light of the tough market, financial institutions are reevaluating their sales and service strategies. Now more than ever, institutions must pay close attention to their people and message. Why? Because extreme focus needs to be placed on brand-building and brand loyalty. Branding is paramount in acquiring and retaining customers. As a result, more and more financial institutions are using shop studies to monitor how current and potential customers perceive them.

Here are a few very important steps to consider in initiating your program:

1. Understand what you would like out of the program and how it can help you reach your strategic goals. This element, as well as nearly all of them listed in this article, has everything to do with the firm — better described as the partner — you choose to create and manage your program. Effective shop programs tie into the strategic corporate goals and cultural direction of the institution. If an institution for example lists "being a market leader in the service we provide our customers" as a portion of its mission statement, then service is a strategic goal and should be

treated as any other competitive, finite strategy. "Service" should have its own ledger. Managers should be held to corporate goals through various measurement systems, communicate goals sufficiently, be given incentives to achieve goals, etc. This means that appropriate systems need to be developed to measure progress. A sound structure for feedback and communication of results is also required.

This type of information should be gathered in the discovery stage of the partnership with the firm you choose to assist you in your service venture. A sound, experienced firm will truly understand its client's corporate culture and departmental goals. Questions from the firm should cause your individual management teams to truly think through every facet of how a program can, and will, help achieve corporate goals.

2. Develop metrics. Setting clear objectives is paramount in evaluating program effects. Customer service indexes, for example, are extremely effective metrics in benchmarking and cultivating service consistency. They can be tied to dynamics such as retention statistics, sales increases, profitability numbers and turnover ratios to paint a clear ROI picture.

These indexes include mystery shopping as a major component of real-time service provision. Realistically, what the program should do is create a cultural initiative throughout a branching network — it doesn't simply measure who is shaking hands and who is not. Everything from merchandising to retention techniques can be driven to extreme levels with these types of indexes.

Of course, the way managers use the index is vital in the overall success of the program. This concept however, should be part of the initial discussions with the research/mystery shop firm you choose. That firm should have analysis capabilities at a minimum and understand how to make your numbers work for you. Additionally, the partner you choose should be experienced in providing management and coaching techniques based on the findings of your customized shop study. Simply put, their job is to make your study an easy-to-use management tool.

3. Analyze research design and training initiatives. The evaluation format, frequency and report translation and methods at the management level also play a great role in your program's success. Your management needs to consider the optimum internal team to be involved in evaluation and scenario development. Your provider in turn should be able to tell you the types of data you should capture based on the specific needs of your institution as well as benefits of blind studies, benchmarking, point scoring, etc.

Also remember that consistency throughout each customer contact point is the goal here. Therefore, sending the same message, from e-mail correspondence to smiling frontline staff, means that everything should revolve completely around corporate training formats. The firm that develops the shop program needs to understand training procedures, expectations and goals. This lets managers use data in a meaningful, concise manner and gives insight on when and how to alter the program over time.

4. Consider administration structure. Select a firm that can help with the internal administration of the program after the development plan is constructed. To do this, the vendor must be able to work in tandem with either a single internal manager or an entire team from your institution. Your partner should know the answers to a variety of questions such as: Who needs to see what type of data? When and how would they like to see numbers? What additional types of exception reporting would be helpful? How will the results be used? Additionally, a provider that offers multi-level management of your shop study will be able to more fully evaluate how, or if, your institution is reaching maximum program benefits.

5. Facilitate team-building. Team-

building causes team members to focus on goals and vision. If you would like better service and increased brand loyalty, you need better teams. If you would like better teams, you need to set goals, train, obtain buy-in, measure progress, coach and communicate results.

The key to this important element of your program is in creating superstar frontline supervisors. They are the true players/coaches and possess the greatest influence on daily service provision. Explained further, a branch manager effectively facilitating consistency — real day-to-day, hour-to-hour consistency — in high-level service provision is somewhat unrealistic. This is due to not only the number of daily duties and management tasks expected of the position but the simple fact that the manager does not work in the same arena, or trenches if you will, as most supervisory staff members do. Therefore supervisors have a much greater opportunity for coaching and reinforcing the service vision.

6. Promote communication. Strong communication between management and staff is essential in any cultural initiative and, certainly of high importance in the success of a shop study. An experienced firm acts as a conduit between the front line and the executive offices. This is done by providing knowledge and format to the front line as well as essential feedback to management on how to successfully coach to the staff's strengths. A forum gets created where buy-in to the concepts and teamwork to achieve goals takes place.

The firm's philosophy on what a shop program is, how it is developed, how it is used and how it helps to formulate culture needs to permeate the institution. Additionally, managers from the firm you partner with should be available for a variety of corporate meetings — from branch staff to executive staff — to describe program set-up, findings and how to improve.

Finally, a dedicated, internal staff member or team needs to be available to your shop company partner. As the relationship develops over the course of the study, communication channels become solidified, creating a seamless facilitation of your program.

Sound teams

As financial institutions continue the effort of doing more with less, the creation of sound teams who understand their institution's defined customer service goals will produce the winners in the industry. A mystery shop initiative facilitated by a trusted partner will help your organization get there — bolstering your standing as the preeminent service provider in the markets you serve.

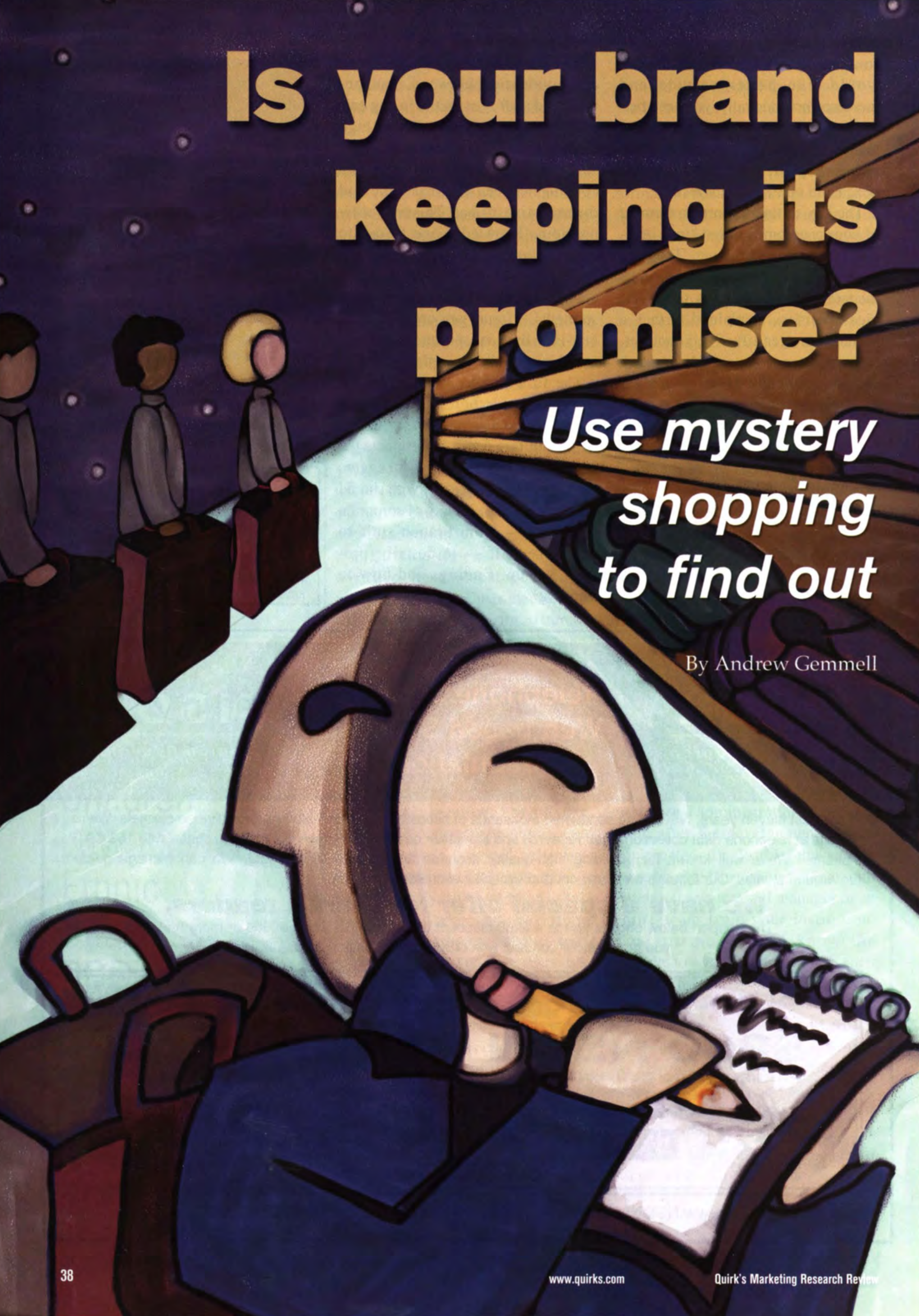
QuickLink

To find out how to set up a mystery shopping program or how to get the most from your mystery shopping provider, visit www.quirks.com and enter Article QuickLink number 551 and 654, respectively.

Is your brand keeping its promise?

Use mystery shopping to find out

By Andrew Gemmell



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It's really no big mystery. Say you're the CEO of a large retail organization. You decide to do a couple of store checks while you're running your weekend errands. Store A is understaffed on a busy Saturday; Store B is out of stock on a couple of key seasonal items. The staff is pleasant, but they don't attempt to cross-sell, and you wait longer than service standards call for at the check-out counter.

Monday morning you discreetly let your findings filter down to the appropriate operations managers. Two weeks later you return to see if the issues have been dealt with. That's the essence of mystery shopping. Every organization wants to know if its brand's promises and customer expectations are being met where it matters most — face-to-face with customers. The last place you want to learn that you're not executing at the store level is on the bottom line.

The urge to mystery shop is self-evident. But spot-checking each location periodically can be nearly impossible for companies with dozens or hundreds or thousands of stores. That's where mystery shopping comes in. As a qualitative market research tool, it gives retail organizations an unbiased, objective snapshot of their organization at any given moment.

Not widely understood

Partly because of its nature (anonymous), and partly because it is relatively young as a discipline, mystery shopping is not as widely understood as other tools such as focus groups or customer satisfaction surveys. These research tools yield the information needed to ascertain what customers want, and what they expect from an organization in terms of products, quality and service. Based on this information, an organization can implement policies, design products and set service standards to meet customer needs and expectations. Mystery shopping is the connecting link to such research tools. Properly designed, a mystery shopping program tells you if your efforts are really fulfilling your brand's promise. Although mystery shopping can be applied to a variety of businesses, it has been used most effectively where the end result depends on a face-to-face exchange with customers.

Many providers

It is difficult to quantify such a growing and changing industry, one that has international, national and regional players, but John Swinburn, executive director of the Dallas-based Mystery Shopping Providers Association (MSPA), estimates mystery shopping to be a $500 million industry.

For a relatively new area of specialized research, there is no shortage of companies claiming to be in the business. The annual *Quirk's* directory of mystery shopping providers lists over 300 firms. MSPA lists 115 members, including some companies in other fields of market research. The Web site www.volition.com, for people who actually do the mystery shopping, lists hundreds of companies offering mystery shopping services, although many of these are local, or focus on a specific industry in a particular region of the country.

Does mystery shopping really work?

As far back as 1954, business guru Peter Drucker observed that, "The main task of business is to create a consistent customer experience." McDonald's has built its brand around Drucker's advice ever since the franchise started almost five decades ago.

Jerry Calabrese is a McDonald's vice president in Chicago. Part of his job includes providing McDonald's field personnel and store owner-operators with store-specific metrics that they use to help assess and identify training opportunities in relation to overall customer experience standards. "We pretty much know why customers come to McDonald's," Calabrese says. "Some of the reasons include such things as hot, fresh food, accurate orders, clean facilities and fast, friendly service. Based on some of our earlier results we have seen a correlation between great execution against customer expectations and higher sales and profit performance. Our ongoing challenge is to measure store performance consistently and objectively against these important customer expectations. Mystery shopping is one of the tools we are using."

While this is the first full year the company has used mystery shopping to help measure performance, early indicators show that top performing stores receive higher mystery shopping scores than their lower performing counterparts. "And while there are many factors affecting sales and store profitability, it is safe to say that providing a great customer experience is a key ingredient to driving a store's overall profitability," Calabrese says.

Mystery shopping also helps retailers that can't depend on several years' worth of repeat business to understand their customers. Mother's Work is a Philadelphia-based chain of 900 maternity fashion stores. "We have a very different set of customer service specs than other apparel retailers," says Samy Verdekal, communications manager at Mother's Work. "It's not as if we offer a brand experience that builds over many years. We only have a chance with customers two or three times in a nine-month cycle so we have to make an impression if we want to grow ahead of the birth statistics."

Obviously, the firm presents a challenge in the shopper recruitment process. "We first have to find mystery shoppers who 'fit the profile,' as it were, and secondly we have to design a shop with unique criteria. A provider has to have these means and resources, otherwise mystery shopping wouldn't give us the information we're looking for," Verdekal says.

"The quality and character of the shoppers are keys to the integrity of the shop and ultimately our credibility with clients," says Sandy Kancylarski, director of operations for Calgary, Alberta-based mystery shopping firm Service Intelligence. "Shoppers have to understand and accept our quality standards and conduct code in order to meet our certification criteria. Once we have accepted shoppers for an assignment, we provide them with background on the company, objectives of the shop, and our performance expectations."

The relationship between shoppers and providers extends to the second half of the process as well. Once the shops have been completed, shoppers must file reports, or assignment-specific forms in Service Intelligence's case, within 12 hours. "The turnaround time is critical," Kancylarski says, "because if a client's brand delivery is deficient, clients should be in a position to respond and bring customer service levels up to standard before more customers drift away."

Involve and inform employees

Mystery shopping is anonymous because it is designed to measure unrehearsed, real-life, and spontaneous employee behavior. By the same token, the mechanism that makes it effective can backfire if mystery shopping is used for the wrong reasons, or if it is implemented while employees are kept needlessly in the dark.

Providers cannot manage their clients' motives, but they universally recommend that companies involve, or at least inform, their employees about the program, or risk having it be seen as Big Brother-style employee surveillance. Industry best practices show that employees expect to be evaluated, and accept the logic of anonymous, third-party participation as long as the standards are fair and the objective is to improve customer service. As a result, employees know they are subject to spot evaluation, they just don't know when or by whom. In the company's favor, it can be shown that customer service improves across the board in anticipation of a mystery shop evaluation.

REI is an outdoor gear and apparel co-op based in Seattle with 63 stores in 24 states. Carolyn McKernan, REI's marketing research manager, explains how REI has folded mystery shopping into an employee program that promotes customer service excellence — one of the organization's seven core values. "REI's reputation is based on great customer service," says McKernan, "so mystery shopping is one of the tools we use to both measure performance and recognize and reward employees."

Appropriately enough, REI has labeled its mystery shopping program ROCS — an acronym for Recognizing Outstanding Customer Service. Any employee who achieves a perfect mystery shopping score gets a ROCS lapel pin attached to his or her signature green REI vest. The results of each mystery shop are available to the stores, so employees can monitor their own performance levels. In addition REI uses the results, in part, to determine the compensation bonus structure for its stores. "Our seven core values are part of REI's culture," McKernan says, "so no one minds an unbiased performance audit — especially if we are being rewarded for the results."

Who are these mystery shoppers?

If you want to know who mystery shops, go to www.volition.com's chat room. That's where college students, soccer moms, flight attendants and retirees all go to swap shopping tips and techniques with fellow mystery shoppers.

Larry Estep of Springfield, Ill., has been shopping for three years and enjoys the anonymity, the experience and the supplementary income. "It's great for an independent contractor," he says. "Typically I choose the number of shops I want for the first half of the month from hundreds of postings in my area from dozens of providers. By now I know the providers and the clients I want to work for, and I've built up a good relationship with the schedule makers.

"On a busy day, it can be tough to make mental notes of everything, and you can't walk in with a Palm Pilot. That's why we develop techniques like doing work in a restaurant or making notes in the fitting rooms," Estep says. "It's important to remember that we all have good days and bad. What's noteworthy is when I re-shop the same store in the second half of the month and all the issues have been resolved. I really enjoy revealed shops. That's when an employee is rewarded on the spot for outstanding customer service. Then it's smiles all around."

Florence Black has been mystery shopping southern Alberta for the past two years. "I love doing it," she says. "I tie the shops into my other chores and visits, and with the variety of clients I shop — Honda, Canada Post, Winners — it's like putting the pieces of a puzzle together. I'm a stickler for details, especially in restaurants, but I try to find more good ones than bad. What I really notice is what a difference it makes in the atmosphere of the whole store when employees seem to be working as a team. Things just seem to work better when that's happening."

Cathy Stucker of Sugar Land, Texas has taken mystery shopping to the next level. As a veteran shopper, she saw a need for greater proficiency among shoppers. So she wrote a manual for mystery shoppers which is now in its fifth printing. She based the manual on the providers' need to strengthen the shoppers pool or risk losing credibility with clients.

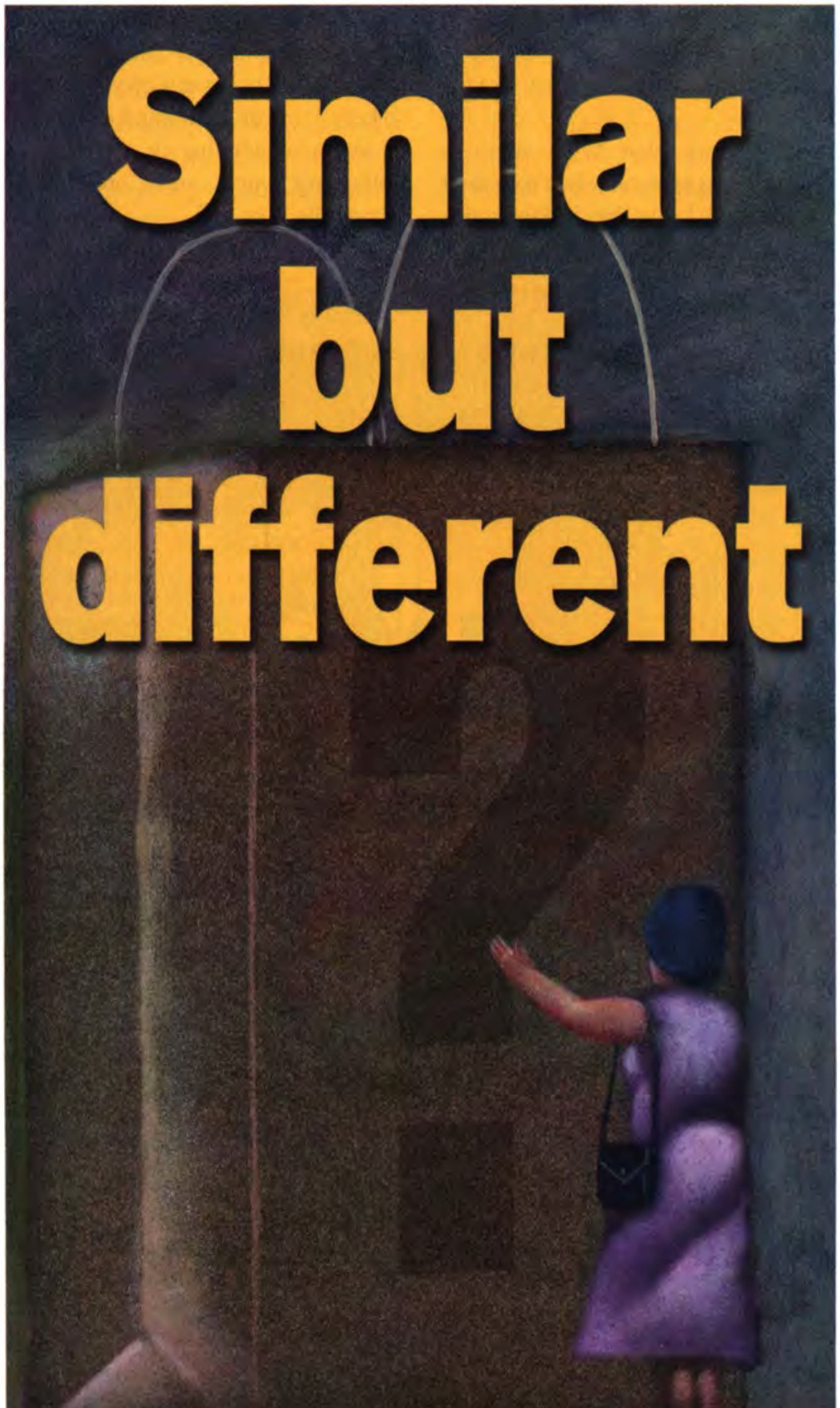
In her experience, customers are reluctant to tell retailers the truth, or at least the whole truth. They'd rather just not come back. Customers are either not honest, won't look for things, or are inconsistent. According to Stucker, mystery shoppers represent the opposite of all of the above, and therein lies the value of their services.

Improve brand equity

Mystery shopping helps you determine if you have the programs and processes in place to improve brand equity, transaction by transaction. For most companies, brand equity appears on the balance sheet in the form of goodwill. The real question is: can you quantify that number, and more importantly, make it move in your favor?

"Customers relate to the sum of a variety of experiences when they think about brand," says Joe LePla, author and partner in Parker LePla, a branding consulting company. "All these elements, including the products and universal service standards, contribute to brand identity. And ultimately it is the brand to which customers become loyal more than the company or its products. So using mystery shopping to keep score of your brand, as it were, in terms of whether or not you are delivering your promise, only makes sense," he says.

Similar but different



Mystery shopping isn't customer research

By Tracey Conners

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Mystery shopping can play a key role in the assessment of customer satisfaction levels in your organization. But it does not provide you with true customer feedback. Why? Because mystery shoppers are not true customers. Mystery shoppers are trained to be objective and to report back on what was observed during the time of their visit. They are paid to pay close attention. They are asked to observe a pre-determined number of items and to carry out a specific scenario (dialogue or interaction with the staff). That means they are somewhat detached emotionally from what is really happening during the course of the shop. Hired shoppers do this more effectively than management because they can be anonymous and report without bias.

What mystery shopping does for your organization

A mystery shopper program should not be designed to seek out mystery shoppers' views or opinions. It should be designed to provide you with feedback on what is happening at the customer level. You will get research from a customer's perspective, which means the mystery shopper has put themselves in your customer's shoes and will tell you how the service delivery looks from the customer's side of the counter.

How does mystery shopping help assess customer satisfaction? The customer satisfaction research cycle begins with finding out what the customer's expectations are. Consumer surveys, exit surveys and focus groups are some of the classic market research methods used to gather this information.

Once the corporation feels confident that it knows what the customer expects, it then has to figure out how it will deliver the products and services to the customer's satisfaction. Specialists and professionals are consulted to determine exactly how this will be accomplished.

Management sets operational and service standards and develops communication materials and training models for staff training. Operation systems are implemented and staff is trained in customer service and sales. They're coached and allowed time to practice.

Mystery shoppers are then sent in to report on service delivery. When results are analyzed in aggregate, mystery shopping determines the strengths and weaknesses in operations and front-line performance. The corporation becomes aware of where it has succeeded or failed. Top performing employees or outlets can be recognized. Weaknesses in communications and training can be identified.

If weaknesses are discovered, further staff training and fine-tuning of operations should take place to improve service delivery, which in turn would elevate customer satisfaction.

The mystery shopper's perspective

To get a better idea of how an actual mystery shopping visit is conducted, let's go through the process with Sally, a fictional mystery shopper.

Sally has been asked to conduct a mystery visit in a sit-down family restaurant. The client has asked that she observe a number of key operational and performance items.

Sally enters the parking lot and observes whether the parking lot and grounds are well-lit and tidy. Then she notes the time (makes a mental note of the observation since mystery shoppers do not write things down as they go) when she enters the front door of the restaurant. She approaches the hostess podium and waits for assistance. Assistance is not immediate so she notes the waiting time.

Finally, the hostess arrives! Does she smile and make eye contact? Greet Sally and welcome her to the "ABC Restaurant"? Sally looks for the hostess' name from the name badge. The hostess tells her a table will open up soon. She discreetly checks the time on her watch again so that she can note how long she had to wait for a table.

She takes this opportunity to go to the ladies room to check out the cleanliness and stock. She ducks into a stall to write down on a piece of paper some of the information she has stored in her head. When she gets back, she is escorted to her table. She notes the time she's seated at the table. She carefully makes note of how long it takes for the server to come. Again, she's looking for the welcome, greeting, smile, eye contact. Does he say his name and offer to take her drink order? Did he upsell on the order by suggesting a larger size drink or an appetizer? How long did it take for the drink order to come?

Sally tests the server's product knowledge by asking key questions about the menu items. While she's waiting for her food to arrive, she's discreetly checking for chipped glass, stains on flatware, upholstery and linen, available condiments, dust on lights and window dressings, perhaps even gum under the table. She notes how long it takes for the food to arrive. Was it served at the right temperature? Were the food items fresh? Did the server check back on her within five minutes to ensure that she was satisfied and had everything she needed? As she eats, she's also observing other areas of the restaurant, the staff in general and the other customers and the service they are receiving. Did the server offer her coffee and dessert? Did he bring the check promptly? Was it for the right amount? Did he give the right change? Did he thank her for her business? Did the hostess say goodbye, thank her and invite her to return?

By the time Sally has completed her mystery visit she has a lot of information to remember and consider. If the question "Did you enjoy your meal?" appeared at the end of the mystery shopper form, her answer would most likely be: "Not particularly. I was kind of busy working."

Fullest picture

Visits like these, which gather data from the front lines, can help you find out if your store is operating to the organization's satisfaction. Again, while mystery shoppers play the part of customers, they are not actual customers. So if you want to find out if you are operating to your customers' satisfaction, ask your customers. But don't forget the value of sending a trained, detached observer to interact with your employees and experience your operations at the retail level. Taken together, mystery shopping and customer research give you the fullest picture possible.

Blazing a trail together

Researchers and usability engineers need that pioneer spirit

By Dean T. Barker

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Business pioneer Charles Coolidge Parlin creates a commercial research division at Curtis Publishing Company in 1911 and establishes the field of commercial research. His work proves so successful that other industrial and advertising firms soon follow suit. Several years later, the first major book on the topic of commercial research appears, *Commercial Research: An Outline of Working Principles*, by C.S. Duncan. Following World War II, as commercial research experiences exponential growth, the Ergonomics Research Society is formed and the book *Applied Experimental Psychology: Human Factors in Engineering Design* is published. This establishes the field of human factors and ergonomics, whose practitioners work primarily on applying cognitive psychology and ergonomic principles to the engineering of military equipment.

In their early years, these two fields could never have imagined that their paths would eventually intersect. However, by the end of the century, the proliferation of computer software, and in particular the phenomenon of the Web, would bring them together as part of the e-product development process. Sadly, practitioners in each community of practice may not yet know that their paths have crossed.

Commercial research has now evolved into modern marketing research. Similarly, human factors and ergonomics has evolved, albeit somewhat factiously, giving rise to human-computer interaction, a discipline whose practitioners, interested primarily in research and engineering related to the usability of software systems, have coined the term usability engineering for their work. In the age of computer software and Web development, marketing research and usability engineering professionals can often be found in the same companies...working in the

same buildings…eating in the same cafeterias…working on the same projects and products…and never meeting one another.

Could it be possible? Yes, it could and indeed it is. Is it tragic? Perhaps. But perhaps it does not need to be so if we can reach out and shake each other's hand. Those with a pioneering business spirit, like Charles Coolidge Parlin of Curtis Publishing Company, may expect the glory bestowed on such adventurers and an opportunity to turn a tragic ending into a happy one.

Commonalities, distinctions

So, how do we start to reach out to one another? First, it is important to understand the commonalities and distinctions between the two communities. Marketing research and usability engineering have much in common. We share research methods, facilities, concerns about data, and above all, research participants. But, for all that we share, there are still some important differences.

For collecting primary data there is no difference in the general approaches between the two fields. Both communities employ experiments and observational research, focus groups, surveys, and interviews. These general methods are the tried-and-true tools of all social scientists. And, like any research, the success of a specific study lies in fundamentals such as research planning, utilization of the scientific method, development of sound hypotheses, and the researcher's ability to clearly communicate research results.

Although we do share methods, one key distinction between our fields is the purpose we each have for conducting research. Marketing research is concerned primarily with matters of preference. Usability engineering is concerned primarily with matters of performance. Standard performance issues are such things as understanding how long it takes users to complete a task, how many and what kind of errors they make, and how frequently they require assistance (such as opening online help, referring to the system's documentation, or calling a help desk).

Marketing researchers want to know if a customer will buy the product and how well they like it. Usability engineers want to know if a customer can use the product efficiently and effectively. For research related to the design and evaluation of software and Web sites, marketing researchers will focus on issues such as whether or not all the desired features and functions exist in the product, whether or not it is appealing, or perhaps they will look to see if anything in the results generates a new product idea. Usability engineers conduct research almost expressly for the purpose of finding barriers to ease of use and determining what design changes are needed to remove those barriers.

The most typical method employed for research is different in each discipline. For marketing researchers, it's a focus group. For usability engineers, it's a usability test. However, both use a central research facility, require only a handful of participants, and are implemented by a skilled moderator. But while focus group studies collect data via verbal interaction in a single small-group discussion, usability tests gather data primarily via observation of participants performing tasks with the product in individual sessions. However, both types of studies are nomothetic and seek to generalize and extrapolate findings from this small sample size to a category of customers.

It's in the categorization of customers where we can find another distinction between the two fields. The categorization of customers for marketing researchers is the creation of market segments. For usability engineers it is the definition of user groups, which are not defined primarily by demographic or psychographic attributes but by characteristics of interaction and how customers use a product.

For example, consider a fictitious Web site that provides free online classes and information about financial services such as investing and banking. The provider's objective for creating the Web site might be to generate business from customers who learn about personal finance and ultimately require professional advice or become interested in purchasing investments.

A market researcher might categorize customers by the following market segments and demographics:

- young (25-35 years old with minimum of $40,000 annual income);
- middle age (36-49 years old with minimum of $50,000 annual income);
- pre-retired (50-59 years old with minimum of $60,000 annual income);
- mature (60+ years old and/or retired with minimum of $60,000 annual income or minimum portfolio of $150,000).

A usability engineer might categorize customers in the following user groups based on interaction:

- explorer (uses Web site for discovery or surfing);
- general learner (uses Web site for basic education on a broad topic);
- specific learner (uses Web site to find an answer for one or more specific questions);
- action taker (uses Web site to purchase a product or service).

This is an important distinction because such categorizations impact how research is designed, how data is reported, and what strategic and tactical recommendations are made based on the research results.

Can we talk?

Once we've begun to understand more about one another, the next step in reaching out is to establish a dialogue. For us the common goal is (or should be) making better products to meet the customers' needs. In order to help lead our organizations into greater prosperity, we must work together toward the common goal. We must take action to improve the way we do things, such as creating coordinated research studies that are synergistic and perhaps even collaborative, rather than working independently. Only through greater understanding and communication will this happen. Today there are already marketing research and usability engineering professionals collaborating on approaches. For example, visit www.immersibility.org to see an overview of a research method that holistically assesses Web site branding, functionality, content and usability.

Perhaps the truly inspired among us may be even more innovative. Hopefully that is what is in store for our collective future. Currently, the pieces don't always fit. Pause for a moment to reflect about your company or clients. How well integrated are the functions of marketing research, design, development, usability and quality assurance? For most companies the answer is somewhat embarrassing. W. Edwards Deming, the leader of the total quality management revolution, said that all work is a process. Producing a product is simply a process. But most companies don't have a product development process or methodology that supports the integration of these functions. Therefore, results differ on a project-by-project basis. Sometimes it works well, but most of the time it doesn't.

Successful software development efforts account for approximately 5 to 15 percent of projects, according to data released from sources ranging from The Standish Group to the U.S. government. A technology project has only a modicum of hope for meeting customer needs, let alone being delivered on time and on budget. In what other industry would this be acceptable? Could a grocery store stay in business if only one out of 10 customers coming through the door was able to successfully find the items they wanted and get through the checkout line happily?

Improvements can start with us working together. But ultimately we need to not only work with one another but also work to make changes in our macroenvironment to improve the product development process. Not only must we establish a dialogue with one another but also with other business functions related to the development of the products we help to create. Because marketing researchers and usability engineers are uniquely positioned with direct contact and relationships with customers, we're good candidates to initiate change. There is power in being a customer advocate. We should be able to communicate with corporate management and production staff to improve the way our businesses operate in order to make our products the most desirable and best-of-breed.

Some glory, a few arrows

This is the kind of pioneering approach that is needed in the future. You can be a part of that. If you are, then like true pioneers you might expect some glory. However, you might also expect an arrow or two in the back along the way. Not from one another, but perhaps from the foes that fight change and evolution. In this new millennium the competitive advantage belongs to companies that focus every bit of energy they have on the people who open up a box and install the company's software or those people who enter a password or credit card number into a Web form and spend money on the company's site. Market researchers may use the term customer. Usability engineers may use the term user. But it's the same person who gives our professions a purpose; the very same human being without whose business our employers would be bankrupt.

Not every organization will be willing to embrace this fact. Nor will every marketing research or usability engineering professional. But if you embrace this, you may be a pioneer. You may be a valuable change agent for your company and without your bravery their business may be in peril. So take a chance. Be a pioneer.

How to prospect for customers using ZIP code profile models

By Ryan Jennings and Tony Dubitsky

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Question: What kind of customer prospecting tool is inexpensive, easy to develop and implement, and powerful even if you don't have extensive promotion history or individual-level demographic information on your customers?

Answer: A ZIP code profile model. This tool can be used to leverage what you know about the areas where your current customers live to improve your customer prospecting.

A ZIP code profile model uses the geographic features of your current customers to help you predict where your best prospects reside. That said, you should use this tool only if your customer base is geographically dispersed. For example, it would not be appropriate if applied to customers of a new product available only in a narrowly defined test market, or to an established product that had an extremely limited distribution.

A key assumption of the ZIP code profile model is that "birds of a feather flock together" — the demographic characteristics of a customer's ZIP code area can stand in for the demographic characteristics of the individual customer. You may question this assumption, but it's the basis for many effective geodemographic systems over the past 25 years.

Not surprisingly, ZIP code profile modeling has benefits and limitations. On the plus side, it's definitely inexpensive. Indeed, the only data you'll need are the Census Bureau's STF 3B $200 dataset, and a current list of U.S. ZIP codes, the latter of which can be found in most desktop mapping programs. Most of your cost will be incurred in manipulating rather than in purchasing this information.

Another plus is that a ZIP code profile model is easy to implement. The

purchasing this information.

Another plus is that a ZIP code profile model is easy to implement. The final outcome is a list of ZIP code areas that can be ranked based on your model's prediction of customer penetration (the number of your customers — be they individuals or households — divided by the population). Once the model is complete and all U.S. ZIP codes are scored, there's no need to deal with complex equations. To use the scores, all you need to do is match the ZIP codes on the scored list to the ZIP codes on your prospect list. Higher-scoring ZIP codes represent better prospecting opportunities than lower-scoring ZIPs. But you don't have to stop there. You can append the ZIP code profile model scores to individual customer records (in which customers in the same ZIP code area will receive the same model score). You could also use this information with other individual-based marketing and promotion variables to build a customer-level prospecting model.

On the minus side, you get what you pay for. Currently, ZIP code level data is only as recent as the 1990 Census. The good news is that an updated STF 3B file was scheduled for release in late 2002.

Another limitation is that the U.S. Postal Service (USPS) developed the ZIP code system as a way to improve mail delivery, not as a way to map markets. Consequently, the USPS may add, change, or delete ZIP codes without much, if any, forewarning. Nor is this unit of geography integrated within the hierarchy of other, more familiar Census-based areas, such as households, blocks, block groups, census tracts, counties, states, divisions, and regions. Since the USPS makes no effort to produce demographically homogeneous ZIP codes, demographic characteristics within a ZIP code can vary dramatically. As such, ZIP code demographics do not apply to each resident in a given ZIP code area, only to the area as a whole. In short, ZIP code-level demographics are not a substitute for individual-level demographics (the latter of which are relatively more expensive and may not match very well with customers in your file).

Finally, if you have a relatively small base (e.g., less than 20,000 customers), you may find that there is so much sparseness at the five-digit ZIP code level (comprising about 30,000 different unique "buckets") or even at the rolled-up three-digit ZIP code level (comprising 881 different "buckets") that a model will be difficult, if not impossible, to build.

Rationale for building a model

With all these drawbacks, you may wonder why it's still worthwhile to go through the trouble of building a model. After all, isn't it simpler to rank your ZIP code areas by customer penetration, and target those areas with the highest levels? Absolutely not — the beauty and power of a ZIP code profile model is that it will generate predictions for ZIP code areas that are not represented in your customer base. Put another way, it enables you to identify "opportunity regions" within which to prospect, even if you currently have zero or low customer penetration in them. This is because your model is using all of the ZIP code areas in the total U.S. universe, rather than cherry-picking those that are highly penetrated.

Model development and validation

The most appropriate statistical approach for building a ZIP code model is multiple regression, in which you'll attempt to predict one outcome variable — the penetration of your customers in each ZIP code area — using many geodemographic variables from the U.S. Census.

Your first step in building the ZIP code profile model will be to extract the ZIP codes for each of your customers, then summarize customer counts at the ZIP code level. The result of this step will simply be a file with two fields, one with ZIP codes and the other with the corresponding number of your customers in each ZIP. Once this is done, the STF 3B dataset can be matched to your customer count file.

At first glance, the STF 3B Census files contain an overwhelming number of potential predictor variables. These files contain ZIP-level data from the long Census form (mailed to about one in six households, but weighted up to the full population), with information on age, gender, household composition, income, ethnicity, and a wealth of other demographic attributes. The sheer number of fields is slightly misleading, in that the file consists of many continuous variables that have been transformed into categories. For example, gender has been chopped up into its two levels — male and female — yielding a male variable and a female variable; race has been chopped up into the five variables of white, black, Indian, Asian, and other.

The variables are given in the Census files as raw counts; you'll need to divide each by the appropriate base before using them in your model. For example, the number of males will need to be divided by the number of persons in each ZIP to derive the percent of the ZIP population that is male. This arithmetic makes the variables independent of the size of the ZIP code. You'll want to do this because the size of the ZIP code is subject to the whims of the USPS; it's not an attribute of those who reside in it.

The nature of Census data presents several challenges for the modeler. First, many potential predictors must be considered — and ultimately pared down — for a final model. Second, every attempt should be made to prevent highly related variables (such as "% Male" and "% Female") from being entered together into a model; this leads to the phenomenon of multicollinearity, which can prevent a model from even being built.

These challenges make it all the more important for the analyst to have a thorough understanding of the dynamics of the data at simple and complex levels before attempting to build a model. For example, in a preliminary phase, the analyst may reject candidate predictors that show very little variability and/or those that show extreme low or high relationships with customer penetration.

Sample sizes permitting, one best practice is to develop the model on one subset of ZIP codes, and to validate it on the rest. Alternatively, there are several "small-sample" re-sampling approaches (e.g., the bootstrap and the jackknife) that can be used for validation. Once the initial model is developed and validated, you are ready to generate a final model on the entire set of ZIP codes.

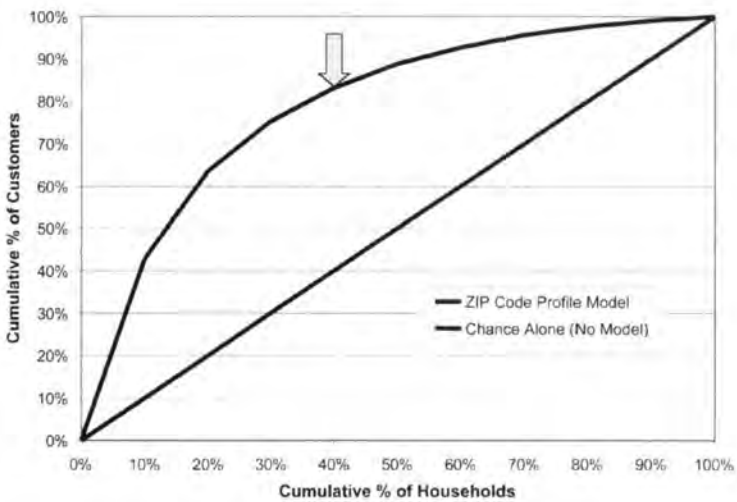
Table 1: ZIP Code Profile Model vs. Chance Alone

Decile	Customers	Households	Cumulative Customers	Cumulative Households	Percent of Customers	Percent of Households	Cumulative Percent of Customers	Cumulative Percent of Households	Index
1	19,651	9,068,347	19,651	9,068,347	42.8%	10.0%	42.8%	10.0%	4.28
2	9,496	9,072,383	29,147	18,140,730	20.7%	10.0%	63.4%	20.0%	3.17
3	5,383	9,066,545	34,530	27,207,275	11.7%	10.0%	75.2%	30.0%	2.50
4	3,626	9,060,902	38,156	36,268,177	7.9%	10.0%	83.1%	40.0%	2.08
5	2,676	9,081,906	40,832	45,350,083	5.8%	10.0%	88.9%	50.0%	1.78
6	1,794	9,051,693	42,626	54,401,776	3.9%	10.0%	92.8%	60.0%	1.55
7	1,348	9,072,455	43,974	63,474,231	2.9%	10.0%	95.7%	70.0%	1.37
8	887	9,061,122	44,861	72,535,353	1.9%	10.0%	97.6%	80.0%	1.22
9	623	9,074,546	45,484	81,609,899	1.4%	10.0%	99.0%	90.0%	1.10
10	457	9,058,996	45,941	90,668,895	1.0%	10.0%	100.0%	100.0%	1.00
TOTAL	45,941	90,668,895							

This final model can be used to score and rank each ZIP code. A spreadsheet of the ranked ZIPs can be used to guide future direct marketing efforts (e.g., selecting all members of a rental list whose ZIPs can be found in the top two deciles).

Table 1 shows the results of a real-world ZIP code profile model for our client, a corporate owner of time-share resorts. The client had observed that customer penetration was particularly high in the Northeastern U.S. and the Central Census Region. There was interest in drilling down deeper to the ZIP code level and understanding what factors were driving penetration. Subsequent to preliminary data analysis, a model was developed on odd ZIP codes and validated on even ZIP codes, with virtually no falloff in performance. We then estimated the final model using all ZIP codes, producing the lift charts shown here. Key variables from the

Figure 1: Graphical Representation of ZIP Code Profile Model Benefit



final model were proximity to the primary resort area, affluence (household income and occupation), and suburban lifestyle (low household density in non-farm areas).

The highlight in the table shows that the ZIP code profile model identifies 40 percent of households that account for over 80 percent of all customers. This standard report required the following steps:

- A ZIP code profile model was built to predict customer penetration using Census data.
- The model was used to generate a customer penetration prediction for each ZIP code in the U.S.
- The ZIP codes were ranked in descending order based on the predicted customer penetration value.
- Successive 10 percent "buckets" (i.e., deciles) of households were created; customers were counted within each decile.
- The percent of customers within each decile was computed and cumulated.
- Finally, the cumulative percent of customers within each decile was compared to the cumulative percent of households within each decile, creating an index representing the performance of the model versus "chance alone."

Figure 1 displays the same information graphically. Again, with the benefit of the ZIP code profile model, the top four deciles account for over 80 percent of all customers. To apply the model, the ZIP codes accounting for the top deciles of households should be targeted in customer prospecting and list selection. They represent the cream of the crop, containing a preponderance of current customers, and they share the demographic characteristics of the areas in which current customers live.

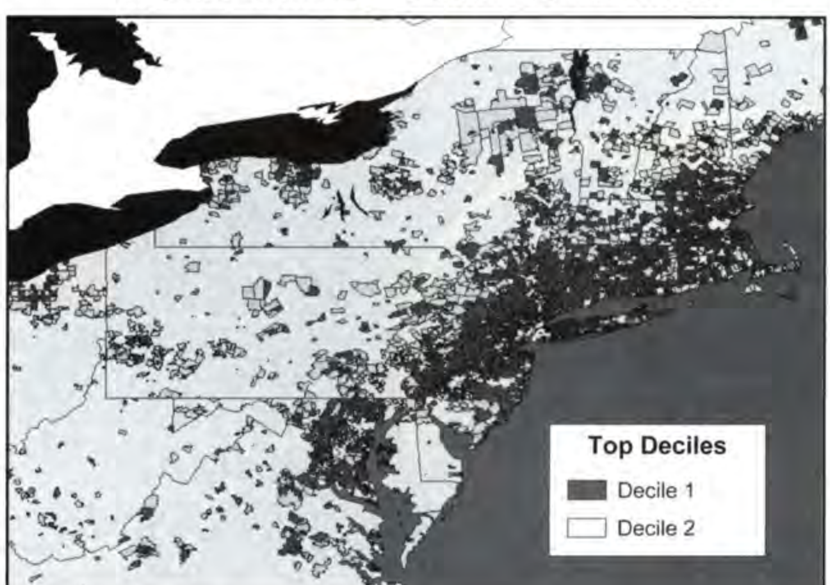
Importance of data visualization

Just as a picture is worth a thousand words, a thematic map — the geodemographic equivalent to the bar chart — is worth thousands of ZIP codes. We can't overemphasize the usefulness of thematic maps in converting a lifeless table of 30,000 ZIP codes and penetration levels into one easily understandable and visually compelling strategic document. Visualizing how ZIP code areas "go together" is difficult without this device, especially because consecutive ZIP codes aren't necessarily adjacent to one another geographically. We especially recommend that you plot the opportunity regions mentioned above as well as the top deciles of scored ZIP code areas. Figure 2 shows the top two decile areas in the East Coast Region for the time-share resort client described earlier.

Efficient, inexpensive

ZIP code profile modeling is an efficient and relatively inexpensive technique that can be used to drive customer-prospecting efforts. It is most effective when used in conjunction with thematic mapping technology. Key requirements are a fairly substantial customer base and a product or service showing geographic variability in penetration. A very useful result is a table of ZIP codes ranked by predicted customer penetration.

Figure 2: East Coast Map of Top Two Deciles from ZIP Code Profile Model



Research Industry News

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agreement to deliver the Apollo In-Store Mobile Management System (AIMMS) to consumer packaged goods retailers and manufacturers around the world. AIMMS enables retailers and manufacturers to use handheld devices to collaboratively address the issues of schematic creation, compliance, out-of-stocks, and inventory control at the shelf level.

Association/organization news

Terri Turley, consumer and market knowledge manager at Procter & Gamble, has replaced Eric Leininger, senior vice president of Kraft Foods, as co-chair of **CMOR**.

Following a year-end review, CMOR announced an increase in revenues of more than 15 percent, and an increase of 8 percent in membership, with client-side membership increasing almost 40 percent (this latter increase a specific goal of CMOR's).

The Mystery Shopping Providers Association has created the MSPA Shopper Gold Certification Workshop, designed to provide participants with information and professional techniques needed to increase their knowledge as mystery shoppers. Topics include: what to do when applying to mystery shopping companies, how to write reports that tell a story, and how to work with mystery shopping companies and independent schedulers. Attendees will be awarded "Gold Certification" from the MSPA, which shows shopping firms that the shopper has been trained in the essentials of mystery shopping and has agreed to uphold professional standards and ethics.

Thierry Tartarin has been named marketing/communications and PR manager for **The European Society for Opinion and Marketing Research** (ESOMAR).

New accounts/projects

Millward Brown Precis has won a bid to be the exclusive provider of media measurement for Pfizer Consumer Healthcare. It has also been appointed to handle a project by Georgia-Pacific.

BMRB Social Research has been commissioned by the Office of the Deputy Prime Minister in the U.K. to carry out a survey of 3,000 households who need help to enable them to live independently. The survey will measure satisfaction with the support services they receive. Together with NatCen (the National Centre for Social Research), BMRB Social Research have also won a new U.K. Home Office research contract. The 10,000 interview survey among people aged 10-65 will include questions on the use of alcohol and drugs, self-reported criminal activity and contact with the criminal justice system. The findings will help the Home Office understand the extent of criminal behavior and the lifestyle factors that predict it.

Menlo Park, Calif.-based **Knowledge Networks, Inc**. (KN) has announced the extension of its relationship with Microsoft Corp. and the MSN TV service. The new agreement ensures KN's ability to maintain a Web-based consumer research panel that represents the entire U.S. population. Knowledge Networks uses random digit-dial techniques to create a sample of the full U.S. population; homes that do not have the Internet are provided with MSN TV units that allow them to participate in the company's weekly Web-based surveys.

Enfoque Pesquisa, a Brazilian market research company, has opened an in-house call center using Global Market Insite's Net-CATI system as the base platform for management of all telephone interviews.

GfK-USM, the Ukraine subsidiary of Germany-based GfK, has signed a contract with the Television Industry Committee, an association of the major TV stations in the Ukraine, including ICTV, Inter, Novy Kanal, STB and three of the country's advertising agencies, DMB&B, Effect Integrated Media and Provid/BBDO. From 2003, GfK-USM will initially measure TV ratings in the Ukraine for a period of four years. GfK-USM will set up a TV panel and measure TV ratings for Ukrainian TV stations and programs. Initially, the TV panel will comprise 1,200 selected representative households in cities with a population of 50,000 or over, which need to have a telephone line. From the third year onward, the sample of households will be increased to 1,500. The four-year term of the contract is worth almost EUR 6 million.

Herndon, Va.-based **WebSurveyor Corporation** announced that pet products retailer Petco has selected it for online survey and hosting services. Petco will use WebSurveyor to assess its e-commerce programs and conduct product satisfaction surveys.

Arbitron Inc., New York, has signed Dial Communications — Global Media Inc. as a new radio network provider for the company's RADAR network radio ratings service. RADAR will report the Dial Communications — Global Media's Contemporary network, Dial-Global Contemporary, effective with the March 2003 release (RADAR 76). The addition of the new network will bring the total number of RADAR-rated networks to 37.

New companies/new divisions/relocations

Millward Brown has opened a new office in Hamburg, Germany. Client service director Corinna Streibart moves from Millward Brown's Frankfurt office to head the Hamburg team.

San Francisco-based research firm **Cheskin** has opened an office in New York. It will be headed by Stephen Palacios.

Company earnings reports

Menlo Park, Calif.-based **Knowledge Networks** posted a record $7.5 million in revenue for the third quarter of 2002, representing 36 percent growth over the same quarter last year.

In the first nine months of its current financial year, Germany-based **GfK Group**'s sales rose by 9.9 percent from EUR 368.3 million to 404.8 million compared with the same period in the previous year. In the same period, EBIT including income from participations rose from EUR 24.0 million to 31.1 million and consolidated total income from EUR 8.4 million to 14.6 million.

Survey Monitor

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in five U.S. households qualifies as a heavy shopper of dollar stores.

• Dollar stores are seeing additional purchases of many traditional food items as manufacturers continue to develop products and packaging specifically for the dollar channel.

	Dollars Per Buyer	% Change/ Year Ago
Cold/Allergy/Sinus Tabs	$7.97	157%
External Analgesic Rubs	$2.63	107%
Internal Analgesics	$6.43	100%
Cold/Allergy/Sinus Liquid	$4.68	76%
Rug/Fabric Treatment	$4.16	64%
Denture Products	$5.32	62%
First Aid Treatments	$1.94	56%
Canned Meat	$4.54	55%
Salad Dressings	$2.84	54%
Gastrointestinal – Liquid	$4.90	53%
Frozen Meat	$7.24	48%
Cough Syrup	$2.97	47%
Mouthwash	$4.94	40%
Skin Care	$8.05	39%
Vitamins	$12.23	38%

Source: IRI Household Panel, 52 weeks ending June 30, 2002, ranked on % chg in dollars per buyer in dollar stores. Total U.S. dollar stores.

Shoppers are also adding more health-care items to their baskets. Over the past year, shoppers of such items as cold care and analgesics have doubled their individual purchases of those items in dollar stores. Eleven of the top 25 growth categories in dollar stores are health or beauty care (see chart). For more information visit www.infores.com.

Percentage of adult women sports fans doubles

According to a national study from Scarborough Sports Marketing, New York, 50 million women avidly follow professional sports (this includes women who are very/somewhat interested in the NHL, NFL, NBA, WNBA, PGA, NASCAR, pro soccer, or MLB).

Talk to any sports enthusiast and most will stereotype the sports fan to be male. Wouldn't they be surprised to know that the female fan is giving their male counterparts a run for their money? The percentage of adult women 18+ who are loyal (very/somewhat avid) sports fans has doubled in the last four years, surging from 29 percent in 1998 to 58 percent in 2002.

The study revealed that Major League Baseball (MLB) was the biggest hit among women 18+ over the last four years, with the number of loyal female MLB fans jumping from 12 percent in 1998 to 28 percent in 2002. Women also tackled football in record numbers, with 31 percent reporting they are loyal NFL fans in 2002, compared with only 17 percent in 1998. Other professional sports organizations that demonstrated measurable growth among loyal female fans over the last four years included NASCAR (increasing from 5 to 13 percent); the PGA (swelling from 5 to 12 percent); the NBA (growing from 11 to 19 percent) and the NHL (increasing from 5 to 10 percent).

In addition to the growth trends among female sports fans, the study also offered insight into the demographic profile, socioeconomic characteristics and lifestyle activities of these enthusiasts. The study indicated that loyal female NHL fans are 34 percent more likely than the average woman to be age 18-34; they are 23 percent more likely to be single; and 70 percent of loyal female NHL fans have purchased sports apparel in the past 12 months. What do these fans do when they're not following the NHL? They are more than twice as likely then the average woman to go in-line skating, 76 percent more likely to participate in team sports and 44 percent more likely to go camping.

Scoring points in more recent years is the WNBA. The loyal female WNBA fan's median age is 42; they are 27 percent more likely to see a movie within the first two weeks of the opening; and 16 percent more likely to have children in the household. They also like to stay active when they're not following the WNBA. Loyal fans are 26 percent more likely than average to go bowling; 46 percent more likely to stay in shape by jogging/running; and 11 percent more likely to enjoy photography in their spare time.

The study indicated that female sports fans are active consumers of, and participants in, a variety of sports and entertainment activities. For example, the study revealed that female NFL fans like to rev things up off the field, attending NASCAR events (48 percent more likely), R&B/rap/hip-hop concerts (35 percent more likely) and comedy clubs (28 percent more likely) at rates well above the norm. Similarly, avid female MLB fans are 25 percent more likely to attend country music concerts, 24 percent more likely to attend rock concerts and 12 percent more likely to buy/lease a new SUV in the next 12 months.

How do female loyal sports fans vary across the U.S.? The markets that post the largest percent of loyal fans are Denver and Minneapolis (both 69 percent). Other high-ranking markets included Buffalo, N.Y. and Cleveland (both 66 percent) and Jacksonville, Fla., St. Louis and Atlanta (all 65 percent). Meanwhile, female residents of Fresno, Calif., El Paso, Texas, Los Angeles, and Wichita, Kan., were the least likely to get in the game, with half of women in those markets avidly following professional sports. For more information visit www.scarborough.com.

Business confidence remains strong despite gloomy global outlook

Senior executives in North America are considerably more optimistic than their counterparts in Europe and Asia Pacific that global economic conditions during the coming year will improve, according to research by

Taylor Nelson Sofres (TNS) in consultation with Deloitte Consulting.

The proportion of senior executives in North America who believe that "global economic conditions will improve" over the next 12 months has increased by 10 percent between Q2 and Q3 of 2002. This contrasts with a decrease of 15 percent in the expectations of executives in Europe over the same period of time and a drop of more than half (51 percent) among executives in Asia Pacific.

The study surveyed more than 600 CEOs, CFOs, COOs, CIOs, heads of strategy and tax directors each quarter from companies in Asia Pacific, Europe and North America. The study found that just 5 percent of senior executives in North America surveyed in Q3 believe "that global economic conditions will get worse over the next 12 months" compared with 10 percent who felt this in Q2.

In contrast, almost one in five (19 percent) senior executives in Europe currently believe that global economic conditions will deteriorate compared with just 11 percent in Q2. In Asia Pacific, almost half (45 percent) of those senior executives questioned in Q3 said they thought that the global economic situation would worsen over the next 12 months compared with just 2 percent in Q2.

Globally, respondents from companies with revenues of less than $1 billion were almost twice as likely to think that global economic conditions will get worse in the next 12 months compared with those from companies with revenues of $3 billion or more. In addition, confidence among those from companies with sales below $1 billion showed the most dramatic decline between Q2 and Q3 with an increase of 19 percentage points in the proportion of businesses predicting that global economic conditions will get worse.

The most pessimistic business sector globally was heavy industry, with more than a third (37 percent) of respondents in Q3 saying there would be a decline in the global economic climate over the next 12 months. None agreed with this statement in Q1 and Q2. In contrast just 12 percent of respondents from the financial services sector felt that economic conditions would worsen.

CEOs and tax directors demonstrated the most significant decline in confidence since Q1 at the global level, with heads of strategy and CIOs emerging as the most optimistic over the past three quarters that global economic conditions will improve during the next 12 months. For more information visit www.tnsofres.com.

Internet penetration at 66 percent of adults nationwide

The nation's online population remains stable, showing only a slight apparent increase after a pause which coincided with the bursting of the dot-com bubble. According to data from The Harris Poll, fully two-thirds (66 percent) of all adults are now online. This includes more than half (55 percent) of all adults who access the Internet from home, almost a third (30 percent) who access it from work, and almost one in five adults who go online from a school, library, cyber cafe or other location. Of course, some people are online from two or more places.

These numbers show rates of Internet penetration have remained fairly stable, with a non-significant apparent increase from 64 percent to 66 percent in Internet penetration (for those online at any location) since fall 2001. Those online from home are up from 52 percent to 55 percent; those online at work are up from 28 percent to 30 percent, and those online at another location are unchanged at 19 percent. Additional waves of data collection will help to determine whether this increase is, in fact, significant.

The profile of Internet users still has a bias towards the more affluent, better educated consumers, but the profile by age is looking more like a cross-section of all adults — up to, but not including, those over 65, who comprise 16 percent of all adults but only 5 percent of those online.

One other interesting finding in this research is that there has been little change in the amount of time Internet users spend online. On every occasion Harris has measured it, respondents have been spending seven or eight hours online each week. A reasonable assumption however is that as technology and Internet skills have improved, people can get more done now in the seven or eight hours they spend online than they could have a few years ago. For more information visit www.harrisinteractive.com.

College Board

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of the survey, save it, and then come back later to add more information. Key to this design was dividing the survey into sections of a manageable length with a "save" button available at any point in the survey.

Mullen and his team designed the survey so that completed portions appeared in a different color on the index page, enabling a returning respondent to quickly move to uncompleted or partially completed sections.

Include a "send" button

The period during which individual college admissions officers worked on their surveys ranged from a single day to several months, depending upon how long it took for them to gather their information. To keep the College Board apprised of the progress of the survey, ThomasTech provided weekly reports to Gernand about who had logged into the site, who had begun the survey, and who had completed the survey.

Those who had started the survey but hadn't completed it were sent periodic reminders prompting them to finish, resulting in a higher rate of completion.

In the end, Gernand wanted to know when respondents were finished so their information could be tallied into the survey totals. By including a "send" button feature, Gernand and her staff were able to distinguish between those who were done and those who still needed more time to complete the survey. "Be sure to give them a mechanism that lets you know when they have finished the survey, otherwise you don't know they are done," Gernand advises.

Ensure data security

Survey participants want to know that the information they are providing is safe from unauthorized viewers. For the College Board, these security concerns were heightened because partially completed surveys needed to remain accessible for long periods, as the survey participants worked to complete them.

In the College Board survey, that security was outlined up front. "Along with the paper survey, we sent a cover letter to each administrator with a user ID and password," Mullen says. "It was important to let them know right away that the process would be secure."

Provide trained help desk support

No matter how well a Web site is designed, users will have questions. That's why it is important to provide them with a toll-free number — and trained representatives at the other end — that they can call to obtain answers. With the College Board survey, respondents logged in from Maine to Hawaii. As a result, College Board used ThomasTech to provide help desk support around the clock. "You need very good help desk support for a survey like this," Gernand says. "Without it, you can lose a lot of respondents."

Keys to survey success

The Web offers enormous possibilities for handling large-scale surveys. As evidenced by the College Board survey, even long and complex surveys distributed to a large number of people can be successful, as long as some basic tips are followed.

• Keep the needs of your respondents in mind by providing a paper-based version of the survey, accommodating a large variety of browsers, allowing respondents to save partially completed surveys and ensuring the security of the respondents' information.

• Have the technical proficiency to deliver your survey. Off-the-shelf solutions may not accommodate many browsers and may restrict your ability to design Web pages to mimic your paper-based survey. And be sure to provide your respondents with the best possible phone support.

The experience of the College Board demonstrates that to produce maximum response rates, it is important to keep the needs of your survey respondents in mind. "I can't overstate the importance of working with an experienced Web-development consultant," says Gernand. "It is critical for the consultant to understand how the survey user thinks."

Product & Service Update

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devices and services, such as digital cable TV, digital satellite TV, DVD players, cell phones, home computers, and broadband Internet access. Breaks for several demographic factors — such as income, age of householders, and presence of children — are also included.

The new report consolidates data from the spring 2002 ownership survey of The Home Technology Monitor, which consisted of interviews with 1,487 homes across the U.S. KN/SRI issues two Ownership Reports and two Trend Reports per year as part of The Home Technology Monitor, as well as How People Use studies that document consumers' day-to-day interactions with and preferences toward key technologies and media. For more information call David C. Tice at 908-497-8075 or visit www.knowledgenetworks.com.

SegmentSolve now in retail version

Market Advantage Software, Inc., Naperville, Ill., is now offering a retail version of its market segmentation software, SegmentSolve. SegmentSolve combines the three classical steps of segmentation (cluster or segment development, segment selection and segment characterization) in one integrated platform. The software starts with raw data and when finished results in a segmentation scheme by combining two required analytical tools (cluster analysis and crosstabulation analysis) with two enabling technologies (identification of the "best" cluster and computer-aided significance scanning). For more information visit www.market-segmentation-partners.com.

Itracks adds Web site usability tool

Saskatoon, Saskatchewan-based online research firm Interactive Tracking Systems Inc. (Itracks) has launched its new Online Usability tool for Web site testing. Designed with input from market research firms, Itracks' Online Usability is designed specifically for market researchers, allowing them to expand their service offerings in the area of Web site testing.

Itracks' Online Usability lets market researchers conduct qualitative or quantitative Web site usability studies. The application can be fully integrated with online focus groups, bulletin board groups or surveys.

Research participants take part over the Internet from where they normally access the Web. These studies are task-based so the researcher always knows the participant's intent. The online reporting facility allows market researchers to view click statistics such as click density and click path, as well as qualitative comments collected in Itracks' verbatim capture.

Traditionally Web site usability studies are conducted in a lab environment, where participants visit a research firm to surf a Web site and sit beside a researcher who asks them questions. Online Usability will allow researchers to conduct studies with geographically dispersed populations, gathering a range of opinions, while providing exercises that respondents can self-administer. For more information visit www.itracks.com.

Quant tool for low-incidence patient populations

Centrac DC, a Rockville, Md., research firm, is now offering Highly Targeted Patient Research (HTPR), a service designed to help clients conduct quantitative research with low-incidence patient populations. HTPR is made possible through a proprietary data resource, which involves a panel of several thousand retail pharmacists that can help target and recruit very specific patients to participate in marketing research studies. The panel is geographically dispersed and representative of the universe of all pharmacies in the continental U.S. The panel also has representation from both chain and retail stores. Recruitment can be customized based on age range, sex, geographic location, therapeutic category, current or former product use, users of competitive brands, length of therapy, and therapy switches. For more information call Jeff Adler at 301-840-3850 or visit www.centracdc.com.

GENESYS system updated

Fort Washington, Pa.-based Marketing Systems Group has released an updated version of GENESYS, its in-house RDD sample design and generation system. GENESYS 2.0 includes expanded online help, improved batch processing capabilities, enhanced reporting, and the ability to define individual RDD samples using multiple types of geography such as a combination of county, ZIP code and census tracts. The new release uses 32-bit architecture, which is designed to provide faster processing and sample generation. Optional network versions support multiple users with any combination of design-only and design/generation capabilities. For more information call 800-336-7674 or visit www.genesys-sampling.com.

Measure impact of online media campaigns

InsightExpress, a New York online research firm, is now offering AdInsights, a real-time measurement service that allows advertisers, agencies and Web publishers to measure the impact of their online advertising campaigns. AdInsights uses InsightExpress's technology to integrate a customized survey directly into an online media campaign. This approach enables clients to quantify

the exposure or "non-click-through" performance of online ads by measuring unaided/aided brand awareness, purchase intent, and other attitudinal dimensions.

Monitoring ads across a single Web site or a network or networks, AdInsights segregates Web users into exposed and unexposed groups. AdInsights also affords marketers campaign measurement control by defining banner or campaign-level frequency thresholds for surveying.

AdInsights also extends beyond a point-in-time research initiative by enabling survey participants to share their opinions in follow-up surveys — days, weeks, or months after their initial participation. For more information visit www.insightexpress.com/products/adinsights.asp.

Two new references from American Map

New York-based American Map Corporation is now offering the Business Control Atlas and Zip Code Atlas. These references both feature new, digitized maps; up-to-date county/town maps for each state, showing places of 1,000 and up (based on year 2000 census figures); color added to enhance the clarity of the maps; and a full-color 50" x 38" map of the United States. The Business Control Atlas includes the following features: latest MSAs/NECMAs shown on state maps; adjoining indexes for counties and towns complete with population figures; enlarged insets for major metropolitan areas; and retail sales by industry, household incomes, and population figures for all MSAs/NECMAs. With population statistics and marketing data by three-digit ZIP code area for 20 categories, the Zip Code Atlas provides an easy-to-read map of each of the 50 states with corresponding indexes. It features: three-digit ZIP code areas shown on state maps; adjoining indexes for counties and towns, showing five-digit ZIP codes, keyed to their respective state maps; and 22 charts that provide demographic information by ZIP code, including statistics on retail sales by industry, household incomes, and population for all three-digit ZIP code areas. For more information visit www.americanmap.com.

Briefly...

Stillwater, Minn.-based mail research firm Readex, Inc., has launched a new business, **The Mail Research Center**, designed to give organizations wishing to conduct a mail survey a complement of supporting services, including access to samples in business-to-business and special interest markets. For more information visit www.b2bmrc.com.

Taylor Nelson Sofres has launched BUY©Test Online, an **online version of its advertising pre-testing solution**. BUY©Test Online addresses traditional advertising pre-testing issues such as cost and turnaround times and is designed to reduce the time taken to measure creative subtleties within advertising. For more information visit www.tnsofres.com.

Geolytics, East Brunswick, N.J., is now offering **CensusCD 2000 Long Form**, which includes such variables as income, housing value, employment, education, poverty, ancestry, and commute to work, etc. The data is available from nation down to tract level, ZIP code and block group level. There are 5,500 variables available at the block group level, and an additional 11,000 are available at the tract level and above. For more information visit www.geolytics.com.

Inside Out, a new book by Myron Radio and Rod Johnson that uses children's stories to **explore issues of personal and professional growth**, is now available from Beaver's Pond Press. For more information visit www.midwestbookhouse.com.

Moderator MarketPlace™

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 952-854-5101. Fax 952-854-8191. Or visit www.quirks.com/media/moderator.asp.

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This directory was compiled by sending listing forms to companies that had advertised a specialization in mystery shopping. We list over 300 firms. In addition to the company's vital information, we've included the industries they mystery shop, the type of mystery shopping services they offer, be it full-service or just data collection, and the span of their services (international, national, regional or local). As an added feature, firms have been cross-indexed by the span of their services. The cross-index section, which can be found at the end of the directory, lists international mystery shopping firms alphabetically, national mystery shopping firms by country, regional mystery shopping firms by state, and local mystery shopping firms by metropolitan area. This directory is also available online at www.quirks.com.

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RoperNOP mystery shopping

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Fax 212-240-5440
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(See advertisement on page 89)

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Ph. 630-834-8330
Fax 630-834-3182
E-mail: krothermel@sprynet.com
Karen Rothermel, President
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Schlesinger Associates has been conducting mystery shopping for over 20 years. We have conducted mystery shops in banks, restaurants, retail establishments, automobile dealerships, etc. We have over three hundred mystery shoppers available across the country.
(See advertisement on p. 5)

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Ph. 610-584-0521
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Second To None offers robust solutions for understanding the customer experience across all touchpoints, from in-person to online. Services include mystery shopping program design and administration, competitive benchmarking, analysis and secure, real-time reporting. Diverse shopper base profiled to your needs. National/international coverage.
(See advertisement on Inside Front Cover)

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(See advertisement on p. 91)

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(See advertisement on p. 91)

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Fax 847-516-9315
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(See advertisement on p. 93)

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Fax 407-834-6474
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www.secretshop.com
Nancy Johnson, Office Manager
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Fax 614-766-9419
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Fax 800-600-3851
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E-business, high-tech, executive, medical, and CSM interviewing using 150 CATI/power dialing stations and automated sample control. Our interviewers are drawn from the 30,000+ students of Brigham Young University and are trained and retrained until they are experts in velvet-glove treatment of sensitive respondent samples. We have been interviewing hard-to-reach professionals (physicians, CEOs, attorneys, IS/IT, technologists) for over a decade. Internet research support includes e-mail address verification, PIN # delivery, phone recruit and follow-up of e-respondents, e-mystery shop, and e-CSM administration.
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Fax 651-290-2564
E-mail: SalZorich@aol.com
Sally Zorich, Owner
Locally - Data collection/Field service
B, E, F, H, R, RT, S

International Mystery Shopping

These firms conduct mystery shopping on an international basis.

A&M Business Services, Inc.
Actys Etudes Audit Conseil
Advance In Quality Services
Assistance In Marketing/Los Angeles, Inc.
ath Power Consulting Corporation
Bare Associates International, Inc.
Barry Leeds & Associates, Inc.
Battre Affarer/Better Business
Beyond Hello Inc.
Capstone Research, Inc.
Certified Reports, Inc.
Creative Images Associates, Inc.
CV Marketing Research, Inc.
Danis Research
Design Forum
Development II, inc.
DSG Associates, Inc.
EFG, Inc.
Elrick and Lavidge Marketing Research
ESA Market Research Ltd.
Feedback Plus, Inc.
Hilli Dunlap Enterprises, Inc.
HR and Associates, Inc.
The Insight Works, Inc.
International Service Check
Investigative Marketing Services, Ltd.
Ipsos-NPD
JKS Inc. Market Research
Just The Facts, Inc.
Lodge Service - React Surveys NV/SA
MacPherson Mystery Shopping
Maritz Research
Market Trends, Inc.
Marketing Solutions Corporation
Meyers Research Center
Michelson & Associates, Inc.
Millennium-Research
The Mystery Shopping Company
National Shopping Service
National Shopping Service Network, LLC
NOP World Mystery Shopping
Oy Palvelu Plus - Service Plus Ltd
PAN Research Ltd.
Premier Service Consulting
Presence Mystery Shopping
REACT Surveys Ltd.
Retail Services Sweden
RoperASW - MarketPlace Intelligence
RQA, Inc.
Bernadette Schleis & Associates, Inc.
Scholl Market Research, Inc.
Second To None, Inc.
Sensors Quality Management, Inc.
Service Intelligence Inc.
Service Intelligence Inc., USA
Service Sleuths
The Shadow Agency, Inc.
Shop'n Chek Worldwide, Inc.
Shoppers' Critique International, L.L.C.
SHOPPERS, Inc.
SKA Division of Mediafax, Inc.
Societe DMS (Dynamic Marketing Services)
Speedmark
Taylor Nelson Sofres (TNS) Intersearch
Tenox Appraisal Systems
Thinksmart

National Mystery Shopping

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

ARGENTINA
IFOP-ASECOM Latin America

AUSTRALIA
Hoed Mystery Shopping
Marketing Research Associates

AUSTRIA
Hoffmann & Forcher Marketing Research

BRAZIL
Confirma

CANADA
ACNielsen Canada
Advantage Sales & Marketing Canada, Inc.
Contemporary Research Centre - Montreal
The Corporate Research Group Ltd.
Customer Foresight Group
Evaluation de service Incognito Service Check
Eye on Retail
Innotech Market Research Ltd.
Proforma Consulting Limited
R.I.S. Christie - The Data Collection Company
Sixth Line Solutions
Telepoll Canada Inc.

GERMANY
Confield Research
Kramer Marktforschung GmbH

GREECE
Market Analysis Ltd.

HUNGARY
BellResearch

IRELAND
Pan Research, Ltd.

ITALY
Freni Ricerche Sociali e di Marketing
Pragma S.r.l.

PAKISTAN
Startex Marketing Services

PERU
Datum Internacional SA

POLAND
ARC Rynek i Opinia

PUERTO RICO
The Marketing Center

SLOVENIA
GRAL – ITEO

TURKEY
ProCon GfK Business Information Services

UNITED KINGDOM
Aba Quality Monitoring Ltd.
Falcon research Ltd.
Field & Research Matters Ltd.
MSB-Managing The Service Business

USA
A Closer Look
A Customer's Point of View, Inc.
A Top Shop
A Total Resource Group
ACE Mystery Shopping
Action Research Group
Advisory Group, Inc.
ALCOPS™
American Marketing Services
Amusement Advantage, LLC
Anonymous Insights, Inc.
A-Plus Shopping
ARC Research Corporation
Ask Arizona
At Your Service Marketing
B. Business Solutions, Inc
BanConsult, Inc.
Bartels Research Corp.
BestMark
The Blackstone Group
BMA - BMA Mystery Shopping
Business Evaluation Services
Business Research Group, Inc.
Car-Lene Research, Inc.
Check Mark, Inc.
Check Up Marketing
Commercial Service Systems, Inc.
Confero, Inc.
Consumer Pulse, Inc.
Courtesy Counts, Inc.
Craciun Research Group, Inc.
Cross Financial Group
Customer 1st
Customer Perspectives
Customer Service Experts, Inc.
Customer Service Profiles
Customerize, Inc.
Cutting Edge Research, Inc.
Data Quest, Ltd.
Devon Hill Associates
E&K Enterprises, Inc.
Excel Shopping and Consulting
First Glance
J. Franke Enterprises
Friedman Marketing Services
Hindsight
ICC Decision Services
IMAGES Market Research
Infotel National Marketing
Insight Research, Inc.
Integrity Auditing Services, Inc.
IntelliShop
Ipsos-NPD
Jancyn Evaluation Shops
Keeping Tabs, Inc.
Ken-Rich Retail Group
Rickie Kruh Research
Nancy Levine Marketing Research

The Locksley Group, Ltd.
M.A.T. On-Site Research
Market Alternative, Inc.
Market Dynamics Research Group, Inc.
Market Monitor, Inc./Service Monitor
Market Trends Pacific, Inc.
Market Viewpoint
Marketing Systems Unlimited Corp.
Measure This!
Mosaic Retail Solutions
Mystery Guest, Inc.
Mystery Shoppers, Inc.
Mystique Shopper
National Field & Focus, Inc.
O'Connor & Associates
On-Site Solutions
Pammer Research, Inc.
Pat Henry Market Research, Inc.
Peak Performance Mystery Shopping
Perception Strategies, Inc.
Perceptive Market Research, Inc.
The Performance Group, Inc.
Person to Person Quality
Pinkerton Field Research Services
Precision Research, Inc.
Professional Review & Operational Shoppers, Inc.
Promotion Network, Inc.
Provizio, Inc.
Quality Assessments Mystery Shoppers, Inc.
Quality Check
QualityWorks Associates
The Quest for Best Mystery Shoppers
Quest Marketing Group, Inc.
Quick Test/Heakin
Reality Check Mystery Shoppers
Research Strategies, Inc.
Restaurant Evaluators
Retail Biz Consulting
Retail Diagnostics, Inc.
J.M. Ridgway Co., Inc.
Ritter and Associates
Rocky Mountain Merchandising and Research
Sampling, Events & Promotions, Inc.
Schlesinger Associates, Inc.
Select A Shopper
Service Alliance, Inc.
Service Check.com
Service Evaluation Concepts, Inc. (SEC)
Service Excellence Group, Inc.
Service Excellence Group, Inc.
Service Impressions
Service Industry Research Systems, Inc. (SIRS)
Service Performance Group, Inc.
Service Research Corporation
ServiceProbe
ServiceTRAC, LLC
Ser-View
SG Marketing Group
The Shadow Shopper of Georgia, Inc.
Shoppers' View
ShowIntell, LLC
Sights On Service, Inc.
Signature, Inc.
Sinclair Service Assessments, Inc.
SPAR/Burgoyne Retail Services, Inc.
David Sparks & Associates
Speedmark
Speedmark Information Services
Spot Checks Mystery Shopping
Stackpole & Associates Inc.
Stewart International Associates
Strategic Marketing Services
Survey Service, Inc.
SurveyUSA®
Sutter Performance Audit Systems, LLC
Test Track Research, Inc.
Testshopper.com
Texas Shoppers Network, Inc.
TrendSource
Video Eyes LLC
Western Wats Center - B2B
WestGroup Research

Regional Mystery Shopping

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

Alabama

Connections, Inc.
Graham & Associates, Inc.
MVP In The Field Services
New South Research

California

Cirrus Marketing Consultants
Jordan Associates
Kiyomura-Ishimoto Associates
L.A. Research, Inc.
The Question Shop, Inc.
Reyes Research
San Diego Surveys, Inc.
Margaret Yarbrough & Associates

Colorado
INgather research
IRi Information Research Inc.

Florida
A.I.M. Field Service
Advantage Business Services
Gulf View Research, LLC
Kirk Research Services, Inc.
Mars Research
Opinion Polling Service®
Premack & Associates of Pinellas County, Inc.
Ulrich Research Service, Inc.
Varga Research

Georgia
Beisner Research Associates
Research Inc.
The Secret Shopper Company

Illinois
Marketing Advantage Research Consultants, Inc.
Ann Michaels and Associates Ltd.

Indiana
Indiana Research Service

Iowa
PMR-Personal Marketing Research, Inc.

Kentucky
Market Research Services
Personal Opinion, Inc.

Louisiana
Focus Research, Inc.
Gulf View Research, LLC
New Orleans Field Services Associates

Maryland
Bay Area Research

Massachusetts
Focus on Service, LLC
PatronEdge

Michigan
Barnes Research, Inc.
Crimmins & Forman Market Research

Missouri
Horizon Research Services
Carol Max Marketing Services, Inc.

Nebraska
The MSR Group *(formerly Midwest Survey & Research)*

Nevada
Alert Shoppers
QSI Specialists

New Hampshire
Granite State Marketing Research, Inc.
New England Interviewing, Inc.

New Jersey
Frances Bauman Associates
Opinion Polling Service®
Suburban Associates

New York
J & R Field Services, Inc.
Karlamar Associates, Inc.
Q M S
Surveys Unlimited, Inc.
WAC Survey of New York

North Carolina
CB&A Research, Inc.

North Dakota
Quinn Marketing and Communications

Ohio
Opinions, Ltd.
Professional Management Services

Oklahoma
Higbee & Associates, Inc.

Rhode Island
Capture, Inc.

South Carolina
Low Country Marketing, Inc.

Tennessee
People Plus
South East Market Research

Texas
Consumer Impressions, Inc.
Galloway Research Services
Hispanic Focus Unlimited
M.A.R.S. Marketing & Research Services
Pfeifer Market Research, Inc.

Vermont
Action Research

Virginia
Dominion Focus Group, Inc.
Metro Research Services, Inc.

West Virginia
McMillion Research Service

Wisconsin
Field Surveys & Audits, Inc.
InGold Marketing Assistance Group, Ltd.
Venture Research Corporation

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

Albuquerque, NM
Sandia Market Research

Augusta, GA
Highsmith-Charnock Interviewing Service, Inc.

Bangor, ME
Rapid Research

Boston, MA
Performance Plus

Chicago, IL
Field Research, Inc.
Galli Research Services
Questions & Marketing Research Svcs., Inc.
Rothermel Research, Inc.

Cincinnati, OH
Assistance In Marketing, Inc.

Denver, CO
Strategic Insights, Inc.

Des Moines, IA
Essman/Research

Detroit, MI
IntroMarketing

Fort Lauderdale, FL
J & S Interviewing, Inc.
South Florida Market Research

Gary, IN
KLD Marketing Research, Inc.

Honolulu, HI
Ward Research, Inc.

Indianapolis, IN
Herron Associates, Inc.

Los Angeles, CA
Atkins Research Group, Inc.

Lubbock, TX
United Marketing Research

Memphis, TN
PWI Research

Milwaukee, WI
Lein/Spiegelhoff, Inc.

Minneapolis/St. Paul, MN
Jeanne Drew Surveys
Henceforth, Inc.
Sally E. Zorich & Associates

Newport News/Norfolk/ Virginia Beach, VA
Marketrends, Inc.

Philadelphia/Southern NJ
Liberty Research Services, LLC

Portland, ME
Serunian Investigations & Mystery Shopping

Sacramento, CA
Opinions of Sacramento

St. Louis, MO
Marketing Horizons, Inc.

San Antonio, TX
Service Critique

San Diego, CA
Taylor Research, Inc.

Stamford, CT
LPM Market Research Services

Vancouver, BC
Campbell, Edgar Inc.

Washington, DC
OMR (Olchak Market Research)

Classified Ads

Executive Director

The Marketing Research Association (MRA), a 2,500 member, $2M revenue, national organization, is seeking an Executive Director to oversee all strategic, operational, and financial activities and represent MRA to industry groups/associations/regulators. Candidates must have association management or industry experience, demonstrated ability to work with a Board of Directors, ability to motivate chapters, volunteers and staff, success with membership development, and conference management skills. Solid experience with presentation tools, computer hardware/software, web, etc. needed. Successful electronic directory and magazine experience is highly desirable. Some travel. Bachelor's degree required. Responses by January 31, 2003, to dm2831@momail.sbc.com or to Don Marek, MRA-Executive Search Committee, Box 571, St. Louis, MO, 63188. MRA information available at: www.mra-net.org.

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Case Histories

February

Internet research: Mixed methods — Reaching IT decision makers on the Web
Customer satisfaction: Tracking the experience — Firms employ ECEM systems to monitor all phases of interaction with customers

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April

Business-to-business research: Getting their level best — Research shows importance of service level agreements as potential marketing tool for communications firms

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New product research: A natural extension — NewStar expands its fresh spinach line with salad and sauté kits

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Health care research: A healthy site — University of Michigan Medical Center turns to usability testing to fine-tune an informational Web site on colorectal cancer
Qualitative research: The Revolution is at hand — Moen designs new showerhead after ethnographic research uncovers host of innovation opportunities

July

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October

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Customer satisfaction research: Backing up their claims — Satisfaction research confirms employees' view that Farm Bureau is tops in service

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International research: The future is now — Costa Rican workers choose what they want from a pension service provider

Technique Discussions

January

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Mystery shopping: Is quick service good service? — Customer satisfaction and mystery shopping team up to size up the fast-food industry
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Mystery shopping: Part of the mix — When done properly, mystery shopping can be a valuable addition to service measurement efforts
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Data analysis: The upward spiral of innovation — A review of SPSS 11, DeltaGraph 5, AnswerTree 3

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Advertising research: True circulation — Measuring pass-along readership

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Qualitative research: Establishing a comfort level — Rapport is the root of qualitative research
Packaging research: Going global — Research insights to guide global packaging decisions

May

Telephone research: Using phone methods in a digital age — A look at Web/phone hybrid survey deployment
Quantitative research: Selecting a consumer panel service — Ask yourself a few questions at the outset to make sure you get the data you need
The business of research: When good market research goes bad
Online research: Objectives are carved in stone, but clients always have chisels — The 10 rules of marketing research
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June

Qualitative research: No shows? No problem — Estimating show rates for focus groups
Qualitative research: Implication or recommendation? — When working with qualitative research findings, is one more valuable than the other?
Qualitative research: Climbing up to drill down — Research on new financial services product shows that laddering can be conducted online
Qualitative research: Compare and contrast — Combining online and traditional methods to enhance qualitative studies
Health care research: The value of market data: does the Internet change everything?
Health care research: Diversify your market share: Pharmaceutical companies should incorporate ethnic marketing into their business strategy
Data analysis: Using neural networks to analyze surveys — Part I: an introduction

July/August

Online research: The need for speed — Time-savings as a competitive distinction for online research
Online research: At my own pace in my own place — Respondents share their thoughts on participating in online bulletin board research
Online research: Do as I do, not as I say — Thoughts on testing Web site usability
Technology and research: The wireless Web — A primer for market research professionals
Usability research: Choose your usability approach wisely — Success comes from picking the right tools for the job
Data analysis: Using neural networks to analyze surveys — Part II: building the networks
Data analysis: Do it yourself, Web-style — A look at three Web survey software packages
Online research: My opinion counts — Online research from the participant's perspective
Online research: Privacy, please — Security issues pose obstacles to continued growth of online research
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October

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Customer satisfaction research: Measuring consumer attitudes: what is your scale really telling you?
Customer satisfaction research: Moving beyond satisfaction — How to achieve customer development that leads to loyalty and profitability
Quantitative research: See through their eyes — To write better questionnaires, put yourself in the respondent's place
Retail research: Discounting "blue light special" research — Don't depend on transaction data to get the full picture
Data analysis: Using neural networks to analyze surveys — Part III: selecting the final network

November

International research: Global research: what you need to know to be successful
International research: Focus on Central Asia: conducting research in the post-Soviet era
International research: Q&A: Research in Canada
International research: Drawing a few from many — Using panel research to penetrate the Asian market
Data analysis: Humbug, science, survey research
Quantitative research: Measuring trends: there ought to be a law — There is a law, and it may help you choose the best method for the job
The business of research: Selecting the right research vendor

December

Qualitative research: Reflections in the mirror — What do focus group facilities think of moderators?
Qualitative research: Wearing many hats — From Superman to the Wizard of Oz, the moderator must play a host of roles for every project
Qualitative research: This is not a leading question, is it? — Crafting interviews that emphasize objectivity
Qualitative research: Borrowing from one to enrich the other — Adapting quantitative techniques to qualitative research
Qualitative research: Not-so-stupid recruiting tricks — Or, how to make $75 feel like more than $50 + $25
Qualitative research: Qualitative research develops in China — Ten trends supporting growth
Qualitative research: Uncovering the wants and the needs — Writing focus group reports with significance
Qualitative research: If this car were an animal... — Applying projective techniques to qualitative research
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Market spotlight: Seniors: Why marketers fail to understand the mature market

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Latent class modeling as a probabilistic extension of k-means clustering

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Analyzing discrete choice data on monadic cards

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Nonparametric tests: sturdy alternatives

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A walk through discriminant analysis

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Uncovering customer loyalty drivers using structural equation modeling

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Post-stratification in survey research

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Firsthand experience or secondhand information?

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The effects of 9/11 on Hispanic research

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Sample selection as self-fulfilling prophecy

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Videoconferencing of focus groups: a good option if utilized effectively

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Virgins or veterans? — Who makes up that respondent database?

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Uncle tabulation software

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Managing for profitability

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Organizing your company — are project teams the answer?

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Telephone data collection part I: outsource it or do it yourself?

June
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Survey programming integration

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Videoconferencing moves from convenience to necessity

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Out with the old, in with the new

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With ads, is timing everything?

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Some new possibilities for your library

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Something old, something new

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Analyst sees more growth for MR industry

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Trade Talk

By Joseph Rydholm, QMRR editor

This book is worth its weight

If you don't already have an MBA, don't bother to go to school for years to get one. Just read the new book *Business*.

I kid, of course – mostly. Actually, since *Business* clocks in at 2,172 pages, it might take you years to read it, so the investment in time is about the same. But on the cost front, *Business*, at $59.95, wins hands down over our institutes of higher learning. (I've seen the book at Sam's Club, so perhaps you can shave a few bucks off that price if there's a warehouse retailer in your area. Be sure, though, to employ the team-lift approach to get it into your cart.)

Billed as "the ultimate resource," the book surely comes close to that hype. It boasts over 200 contributors, 2.5 million words of text, 700 illustrations, and 150 maps. It's organized into seven sections: Best Practice presents essays from business writers and practitioners on an array of topics, from turnaround strategies to creating powerful brands; Management Checklists and Actionlists gets more hands-on, presenting brief but dense how-tos on business tasks like conducting an information audit, setting up a grievance procedure, and outsourcing Web site operations; Management Library summarizes what the editors feel are the most influential business books of all time (staples like *The Art of War* and *The Prince* are included, as are newer works like *The Rise and Fall of Strategic Planning* and *The Borderless World*); Business Thinkers and Management Giants contains summaries of the careers and thoughts of legends like Henry Ford, Sam Walton, and W. Edwards Deming; and three final reference sections that include a dictionary, a world business almanac, and a list of business information sources (no mention of *Quirk's* in the marketing research section...an oversight I'm sure will be corrected in the next edition).

Nothing is covered in extraordinary detail but the book avoids a Cliffs Notes-type feel through copious cross-referencing of other sources in the book, on the Web, and in other published forms. Readers can also sign up to receive regular e-mails containing new and updated material.

As a standard business reference, I doubt there's anything else like it.

The psychology of spending

My second selection this month, *Why People Buy Things They Don't Need*, is not the story of my life as a consumer but rather a collection of insights from a veteran researcher on all the forces that assert themselves during the purchase process. Author Pamela Danziger draws from years of experience conducting focus groups and surveys with consumers to give marketers the inside scoop on the psychology of spending.

There are no real surprises here — we all know emotion is a big driver of the purchase process, for example — but Danziger does a nice job of explaining when, where and how factors like emotion come into play (the chapter on the "justifiers" that give consumers permission to buy is especially good). And she keeps things on a real-world level without falling into psychobabble or getting too abstract.

Examining American Latinos

I'll close with a look at *Marketing to American Latinos, Part 2* by Isabel Valdes. *Part 1*, published in 2000, introduced and defined the U.S. Hispanic consumer and gave some interesting case studies on companies that attempted to reach out to this market. *Part 2* has additional real-world examples (with brands like Oscar Mayer, Alka-Seltzer and McDonald's) and makes excellent use of data from the ACNielsen Homescan Hispanic panel to show what Latinos buy. But the most valuable aspects of both books are the author's detailed explanations of why they buy and how to reach them.

Companies seeking guidance on how to begin a relationship with Hispanic consumers or improve an existing one should look no further than this fine two-part series.

Business – The Ultimate Resource (2,172 pages, $59.95) is published by Perseus Publishing, Cambridge, Mass. (www.perseusbooks.com).

Why People Buy Things They Don't Need (224 pages, $34.95), by Pamela N. Danziger, is published by Paramount Market Publishing, Ithaca, N.Y. (www.paramountbooks.com).

Marketing to American Latinos – Part 2 (352 pages, $54.95), by M. Isabel Valdes, is published by Paramount Market Publishing, Ithaca, N.Y. (www.paramountbooks.com).