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## Marketing Research Review

### Mystery shopping

- > Designing and executing a shopping program
- > Boost your brand through mystery shopping



### Online research

- > 10 questions to ask your online research vendor
- > Comparing Web site assessment techniques



2006 Mystery Shopping  
Providers Directory

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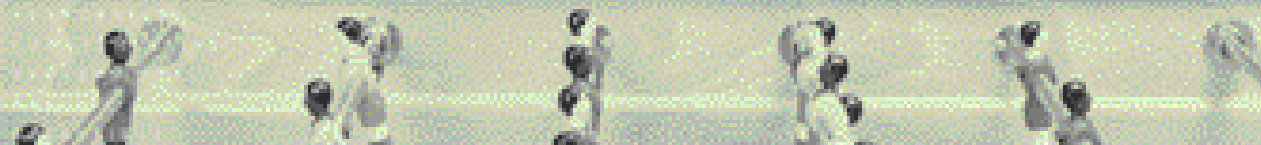
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# contents

## techniques

- 32 What works when?**  
An overview of Web site assessment techniques  
By Tema Frank
- 42 Do some online interviewing of your own**  
The top 10 questions to ask prospective online vendors  
By Janet Savoie
- 48 New problems, new solutions**  
Mystery shopping adapts to serve a range of needs  
By Paul C. Lubin
- 54 Beyond customer service**  
How mystery shopping programs can boost your brand and your bottom line  
By David Rich
- 62 Shopping for shoppers**  
Surefire ways to cultivate the brightest mystery shoppers  
By David McAleese

- 68 Improve the customer experience**  
Methodological considerations in the design and execution of mystery shopping programs  
By D. Randall Brandt
- 74 Ensuring objectivity in packaging research**  
Let the designers design and the researchers research  
By Michael Carlon

## columns

- 18 By the Numbers**  
Converting surveys from paper to PDA  
By Bill Jeffries
- 22 Qualitatively Speaking**  
Add a bit of quant to your qual  
By Linda Stegeman
- 26 Data Use**  
Laying new TURF with NCURA  
By Michael DeHart
- 116 Trade Talk**  
QRCA event emphasized sharing, learning  
By Joseph Rydholm

## departments

- 8 In case you missed it...**
- 10 Survey Monitor**
- 12 Names of Note**
- 14 Product and Service Update**
- 16 Research Industry News**
- 16 Calendar of Events**
- 91 2006 Mystery Shopping Providers Directory**
- 112 2005 Quirk's Story Index**
- 114 Index of Advertisers**
- 115 Classified Ads**

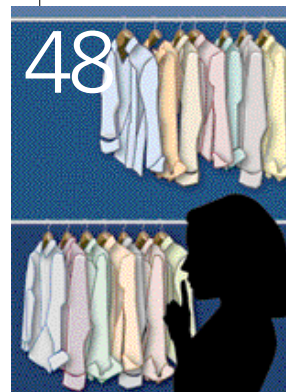


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# In case you missed it...

news and notes on marketing and research



## Two brands show how it's done

For the brand-builders among you, the October 31, 2005 edition of *Fortune* had a quick, informative look at how some of today's top brands achieved their lofty status. For example, power-tool maker DeWalt, a unit of Black & Decker, has raised itself from near death by standard and not-so-standard methods. First, it started making better products (never a bad idea), which improved customer perceptions and allowed the firm to charge higher prices. Then, after its market research told it that professional tool users held the DeWalt name in high regard, the company decided to aim most of its marketing at contractors, who account for 69 percent of U.S. tool sales. Tool-toting reps in DeWalt-yellow trucks descended on construction sites around the country to have workers test and critique DeWalt products in real-world settings. The caravans also found their way to Home Depot and Lowe's parking lots, where contractors and DIYers alike could try out the tools. The company was also savvy enough to make inroads into two booming markets: it has been investing in NASCAR since 1993 and has been paying special attention to Hispanic consumers, who make up 20 percent of its customer base. But the company also knows when to ease off the promotion throttle. For example, it doesn't do TV commercials and it doesn't sell through Wal-Mart. As a result, the brand has become an aspirational item for DIYers. "The less we talk to do-it-yourselfers, the more they want our product," said John Schiech, president of the division that includes DeWalt.

The article also profiled another standout: the Eggo waffle line from Kellogg, which has used targeted line extensions to heat up sales. The company identified two core constituencies - kids and harried adults - and set about finding ways to meet their needs. In 2000, Eggo introduced limited-edition waffles for kids featuring icons like Sponge Bob and Spider-Man. Adults were looking for healthy fare that was easy to prepare and easy to eat. So Eggo created three varieties co-branded with Kellogg's NutriGrain cereal line and later introduced a line of products that can be eaten while driving. The result: the Eggo brand was on track to produce a record half-billion dollars in sales in 2005.

"Breakaway Brands," *Fortune* October 31, 2005

## Is interactive TV finally here?

TV networks and marketers roiled by viewers' ad skipping may find safe harbor online, according to a *BusinessWeek* article. Though broadband Internet access is far from widespread (the Pew Internet and American Life Project reports that just over half of home Internet users have high-speed access), a handful of TV networks are rolling out new Web-only channels that take advantage of broadband's capabilities.

From Comedy Central's *Motherload* to MTVU *Uber* and ESPN360, the Web channels will augment segments of highlights from broadcast shows with all-new and Web-only features. Some execs foresee using the Web nets as a testing ground for shows that may make the leap to the big (ger) screen.

In addition, the online networks can enhance brand loyalty and give broadcasters a way to recapture ad spend that has moved away from traditional TV. E.W. Scripps, for example, owner of HGTV and the Food Network, sees promise for its kitchen design site (which was unnamed at press time), eyeing the more than 25,000 bath and kitchen stores in the U.S. as prospective buyers of classified ads on the site.

As with regular TV, content is king. What advertisers want most is to be next to video.

"There is more money than the marketplace can handle right now for good, high-quality streaming video," said Jeff Meyer, a senior vice president for interactive sales at Scripps. As the article noted, Microsoft Windows XP recently signed a deal to be the sole sponsor of a 13-part, broadband-only cooking series featuring the Food Network's Dave Lieberman.

"TV's New Parallel Universe," *BusinessWeek*, November 14, 2005

## Coming soon from TiVo: ad searching

TV viewers are fond of ad zapping. Will they warm to ad searching? TiVo Inc. hopes so. A November 2005 *Wall Street Journal* article announced plans for a spring 2006 launch of a new system that will let TiVo users record and search for commercials for products and services that interest them. TiVo is working with media-buying firms Interpublic Media, OMD and Starcom MediaVest Group - along with Dallas ad agency Richards Group and the Comcast Spotlight ad sales division. "We're flipping the dynamic," said TiVo President and CEO Tom Rogers. "If you are in the market for a product, and you have no idea when commercials related to that kind of product are going to appear, it doesn't help you very much."

The system will let TiVo users create a profile of products on their TV screens using categories such as automotive or travel or keywords such as "cruises." TiVo will download relevant ads to TiVo recorders over the Web or deliver them, for those without broadband, via traditional broadcast signals. Advertisers can select the preferred categories and keywords their ads will be associated with. Talks are underway to determine pricing for the keywords but one option is a bidding system similar to that used for Internet search engines. As the *Journal* article stated, as consumers' ability to search video content grows closer to matching their ability to search Web content, ads will need to evolve in two ways. They will either need to generate enough buzz to cause consumers to seek them out or they will need to contain less hype and more substantive information.

"TiVo Users Soon Can Search for Ads," *Wall Street Journal*, November 28, 2005





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## Women are biggest ringtone purchasers

San Francisco-based Telephia, a provider of performance measurement information to the mobile phone industry, reports that women outpaced men in purchasing ringtones by two to one during the third quarter of 2005. Sixty-nine percent of mobile ringtones were bought by women, while purchases by men comprised 31



percent of the total revenue share, according to a Telephia Mobile Audio report, which tracks purchase activity for mobile ringtones, including traditional ringtones, realtones, ringback tones and voicetones. Overall, more than 9 percent of the wireless population purchased a ringtone during the last quarter.

“Ringtones provide mobile users with personalization and individualization,” says Brian Monighetti, senior product manager, Telephia. “Cell phones have become everyday accessories and consumers are looking for creative ways to make a personal statement with their devices. The strong demand for ringtones shows the kind of distinctive individuality music gen-

erates.”

The majority of buyers for the most popular ringtones skewed a younger age demographic. Telephia data shows that 40 percent of those who purchased the “Hollaback Girl” ringtone by Gwen Stefani fell into the 18-24-year-old age group, while 51 percent were 25-34-year-olds. Twenty-nine percent of those who purchased the summer hit “Don’t Cha” by The Pussycat Dolls were 18-24 years old, with 59 percent falling into the 25-34 age group. Bow Wow & Omarion’s “Let Me Hold You” and “Just A Lil’ Bit” by 50 Cent skewed a younger demographic, with the majority of those who purchased the ringtones being 18-24. Rounding out the top five ringtones for the third quarter of 2005, buyers for Mariah Carey’s “We Belong Together” were evenly split among 18-24 and 25-34-year-olds, with revenue shares of 38 and 36 percent, respectively. For more information visit [www.telephia.com](http://www.telephia.com).

## Parents change food-buying habits

St. Petersburg, Fla.-based research firm HealthFocus International’s 2005 Trend Report shows that parents have increasing concern for the health of their children and have dramatically changed the way they make their purchase decisions over the last two years.

The study shows that sugar and high fructose corn syrup top the list of sweeteners parents are avoiding. They also are showing greater concern about buying highly processed foods and prefer natural products and products with better nutrition.

According to those surveyed, 37 percent of families have decreased their use of sugar and 29 percent have decreased their use of high fructose corn syrup over the last two years. In part, they have replaced these sweeteners with more natural ingredients

such as honey, maple syrup or fruit juices/concentrates which have shown an increase in usage over the last two years.

“Our research shows that parents prefer to buy natural foods and are avoiding highly processed food,” says Linda Gilbert, president of HealthFocus International. “In fact, highly processed food ranks as the third highest concern for parents when purchasing food for their families.”

The data also show that when shoppers with children in the household are making buying decisions, they opt for better nutrition, better taste and convenience rather than lower calories. When asked about the importance of label statements affecting their buying decision, the survey found that the top five things these shoppers are looking for on food labels are: fresh; good source of calcium; grown without pesticides; whole grain; supports the immune system. “Low in calories,” “low carbohydrate” and “low fat” were all listed in the bottom 10 for importance of labeling statements. For more information visit [www.healthfocus.com](http://www.healthfocus.com).

## Many consumers trust peers more than ads

Consumer trust toward traditional advertising is being challenged by growing confidence in consumer-generated media (CGM) and the recommendations of other consumers, according to a study of consumer behavior by Cincinnati researcher Intelliseek Inc.

A follow-up to a 2004 study on trust in advertising, the 2005 Consumer-Generated Media (CGM) and Engagement Study finds that, compared to traditional advertising, word-of-mouth (WOM) behavior continues to grow in importance in consumer awareness, trial and purchase of new products.

continued on page 78



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## names of note

New Orleans research firm *The Olinger Group* has added **Paul E. Kirch** as vice president of business development. Kirch assumes his new position as the firm prepares to re-open its corporate headquarters, which was destroyed by Hurricane Katrina.

*Cendant Hotel Group*, Parsippany, N.J., has named **Kevin Rupert** vice president of marketing and strategy for Wyndham Worldwide.

*Vision Critical* Vancouver, B.C., has named **Manuel Zahariev** chief tech-



**Baizley**

**Zahariev**

nology officer and **Gord Baizley** vice president of finance and administration.

Chicago-based media information firm *Bacon's Information, Inc.* has named **Shawn Cantor** director of business development, Eastern region.

*Pepsi-Cola North America*, Purchase, N.Y., has named **Meena Mansharamani** senior vice president-innovation and insights.

St. Louis-based *Maritz Research* has named **Elmer Rich** account manager, financial services group. In addition, **Lisa Elderkin** has been named account manager, financial services group. Elderkin is based in Maritz Research's Walnut Creek, Calif., office and is responsible for business development and assisting clients on the West coast.

**Brian Dundon** has joined *Market Vision Research*, Cincinnati, as vice president with responsibility for managing and developing research business.

**Magda Cooling**, a partner with research firm *Opinions... of Sacramento*, has earned Professional Researcher Certification from the Marketing Research Association.

Stamford, Conn., research firm *InsightExpress* has named **Barbara Wade** a director within its consumer packaged goods sector. The firm also named **Melissa Sherman** and **Julie Wu** project manager. **Ryan Grady** has joined the company as an advertising account manager within the advertising and media sector. In addition, **Alison Bemont** and **Marjorie Hoffmann** have been named customer service representative. And **Janelle Taylor** has been named software quality assurance tester, product operations.

**Scott Hanson** has joined *Decision Analyst Inc.*, Arlington, Texas, as senior research manager.

*The Analytical Group Inc.*, Scottsdale, Arizona, has named **Anne Varley** as account associate.

St. Louis consulting firm *The Mattson Jack Group, Inc.* has named **Eric G. John** vice president and **Bernadette M.B. Piassa** senior project director of the firm's marketing research team. They are based in the Philadelphia office.

*Promodata* (Leemis Services), a Chicago research company, has promoted **Adam Samuelian** to vice president/director of IT and marketing.

Port Washington, N.Y., researcher the *NPD Group* has promoted four former directors to vice president: **Stephen Baker**, **Steve Flavin**, **Bruce Schnur** and **Martin Zagorski**.

**Steven Struhl** has joined Portland, Ore., research firm *Doxus* as head of its marketing sciences and methodology team.

Stillwater, Minn.-based *Readex Research* has named **Joe Cline** senior network administrator.

Redlands, Calif., geographic information system firm *ESRI* has named **Brent A. Jones** survey industry solutions manager.

**John Snyder** has been promoted to the newly created position of vice president, Portable People Meter sales, at *Arbitron*, New York. Separately, **Shellye L. Archambeau**, chief executive officer, *MetricStream, Inc.*, has been named to the Arbitron board of directors.



**Archambeau**

**Mount**

**Jane Mount** has been promoted to vice president at *Digital Research, Inc.*, Kennebunk, Maine.

*Scarborough Research*, New York, has named **MJ Angiollo** account director, print and Internet services. **Barbara Quisenberry** has been promoted to director of account management.

**Stephen Bell** has rejoined Cambridge, Mass., research firm *Abt Associates* as a principal scientist in the social and economic policy division. He also joins the Abt Associates Fellows, a group of senior researchers who assess and enhance the quality of the company's work.

**Rodney N. Wright** has been named automotive retail practice leader at *J.D. Power and Associates*, Westlake Village, Calif.

*ComScore Networks*, Reston, Va., has named **Joe Famalette** vice president of sales for the CPG marketing solutions group and **John Golanty** vice president of client services.

Waltham, Mass., research firm *Affinnova, Inc.*, has named **Waleed Al-Atraqchi** chief executive officer and president.





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## product and service update

### Blog tracks culture trends around the world

ModelPeople Inc., a Del Mar, Calif., consulting firm, has launched CultureBlog at [www.modelpeople.info/cultureblog/](http://www.modelpeople.info/cultureblog/), a research product designed to give access to grassroots consumer culture trends in urban centers like New York and Tokyo, and relate them to the macro context.

The CultureBlog is authored by Claire Brooks, ModelPeople Inc.'s president. Blog contributors, called Urban Correspondents, are urban trendsetters with backgrounds such as fashion and consumer media who blog ModelPeople on what's happening locally with regard to consumer trends and provide street photos to illustrate their findings.

CultureBlog's suite of Web-based services also allows ModelPeople to enter consumers' lives online via private photo blogs (uploading photos daily, from digital cameras or phones) or custom chat rooms, adding to ethnography projects which observe consumers in the context of their daily lives. For more information visit the Web site or contact Claire Brooks at 858-755-7150.

### Two software updates from The Analytical Group

The Analytical Group Inc., Chicago,

has released version 6.0 of its WinCross crosstabulation software. Some new features are: SPSS v13.0 compatibility; enhanced statistical testing; and a new data manipulation and sort module which lets users combine an unlimited number of files, with an unlimited number of records. WinCross has increased the 240-character limit on combined text and/or logic to 480 characters. This increase allows longer glossary statements, row logic, row text, table title text, and headers and footers. Variable names have been increased from a maximum of 12 characters to a maximum of 64. WinCross has additional significance testing features: independent T-test for unequal variances; dependent T-test for paired with full and/or partial overlap; and dependent Z-test for paired with full and/or partial overlap.

The firm is also offering WinQuery 5.0, the latest version of its CATI, CAPI and Web interviewing software. Some of WinQuery 5.0's new features are: compatibility with StrataDial.VC2 predictive dialers; enhanced reporting modules; and easier data layout management. For more information visit [www.analyticalgroup.com](http://www.analyticalgroup.com).

### Sample design wizard from StatTrek

StatTrek.com has released the

Sample Planning Wizard, an online tool for cost-effective survey sample design. Using a step-by-step approach, the Wizard helps survey researchers identify the optimum sampling plan – the plan that provides the most precision for the least cost.

With the Sample Planning Wizard, users can assess the effect of different design decisions (sample size, sampling method, sample allocation, etc.) on the precision and cost of research. The Wizard works with simple random samples, stratified samples and cluster samples. It works with small samples and with large samples. And it works with mean scores as well as proportions.

With the Sample Planning Wizard, analysts can compare different sample design options and identify the alternative that best meets their needs. For example, if the research budget is fixed, analysts can identify the sample design that provides the most precision for the fixed cost. Or, if a minimum level of precision is required, analysts can identify the option that provides the desired precision for the least cost.

The Sample Planning Wizard requires no programming. Through point-and-click inputs, the Wizard guides users through the steps needed to evaluate different design options. Statistical computations are performed automatically, behind the scenes. A report summarizes key findings, documents methodology and offers suggestions for improvement. A one-month license, providing unlimited access to the Sample Planning Wizard, costs \$10. For more information, visit <http://StatTrek.com>.

### MB product examines why consumers buy

Research agency Millward Brown,

continued on page 82

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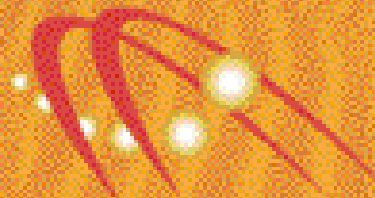
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# research industry news

## News notes

Minneapolis research firm **Iconoculture** has secured a \$10 million financing round led by WaldenVC, a San Francisco venture capital firm. Additional investors include Venture Strategy Partners and General Mills.

St. Petersburg, Fla., media research firm **erinMedia** issued a press release in late November in

which it reported that the Middle District Federal Court ruled in its favor, and against **Nielsen Media Research** (NMR), in NMR's attempt to have the court dismiss erinMedia's federal antitrust suit against NMR. The ruling clears the way for erinMedia to begin conducting discovery and to prepare for trial in this matter. The Court's order has been posted on erinMedia's Web site ([www.erin-media.net](http://www.erin-media.net)) as well as on [www.weshouldallcount.com](http://www.weshouldallcount.com).

media.net) as well as on [www.weshouldallcount.com](http://www.weshouldallcount.com).

Netherlands-based information and media firm **VNU NV** has agreed with **IMS Health, Inc.** to terminate the planned merger of the two companies. VNU said the two companies decided to call off their merger after shareholders claiming to represent nearly 50 percent of VNU's outstanding shares said they would not support the transaction under any circumstances. The merger, announced July 11, 2005, would have required approval from a majority of shareholders to be completed. Under the terms of the termination agreement, VNU has agreed to reimburse IMS \$15 million for its actual out-of-pocket costs, and pay an additional \$45 million to IMS should VNU be acquired pursuant to any agreement entered into within the next 12 months. For its part, IMS has agreed to pay VNU \$15 million should IMS be acquired pursuant to any agreement entered into within the next 12 months. Rob Van den Bergh has stepped down as CEO but will remain until the firm's supervisory board has completed its search for a successor.

Going forward as a stand-alone company VNU said it will maintain its focus on accelerating the profitable growth of its existing businesses. The company said it also would explore additional steps to maximize shareholder value, including: initiating a program to return approximately EUR 1 billion to shareholders, on top of the regular dividend now in place; expanding current cost-management initiatives to all areas of the company worldwide, possibly including some restructuring; optimizing its portfolio by continuing to evaluate targeted changes that will enhance existing lines of

continued on page 86

## Calendar of Events January-March

The Photizo Group will hold a new-product development boot camp for marketing and engineering new-product development professionals on January 25-27 in Lexington, Ky. For more information visit [www.photizogroup.com](http://www.photizogroup.com).

The Business Intelligence Group will hold the BIG Forum on January 31 at ORC International, Islington High Street, London. For more information visit [www.b2bresearch.org](http://www.b2bresearch.org).

ESOMAR will hold a conference on health care research on February 6-8 at the New York Marriott East Side Hotel. For more information visit [www.esomar.org](http://www.esomar.org).

The Institute for International Research will hold a conference on return on marketing investment on February 6-8 at the South Seas Resort, Captiva Island, Fla. For more information visit [www.iirusa.com/romi](http://www.iirusa.com/romi).

The International Quality and Productivity Center will hold its annual Kid Power food and beverage conference on February 6-9 at the Safety Harbor Resort and Spa, Safety Harbor, Fla. For more information visit [www.kidpowerx.com](http://www.kidpowerx.com).

ESOMAR will hold Brandmatters 2006, a conference on branding research, on February 8-10 at the New York Marriott East Side Hotel. For more information visit [www.esomar.org](http://www.esomar.org).

The Institute for International Research will hold a conference on linking customer feedback to business results on February 27-March 1 at the Bonaventure Resort and Spa, Ft. Lauderdale, Fla. For more information visit [www.iirusa.com/customer](http://www.iirusa.com/customer).

ESOMAR will hold a conference on automotive research on February 27-March 1 at the Beau Rivage Palace in Lausanne, Switzerland. For more information visit [www.esomar.org](http://www.esomar.org).

ESOMAR will hold its Asia-Pacific conference on March 19-21 at the JW Marriott Hotel Mumbai. For more information visit [www.esomar.org](http://www.esomar.org).

The Institute for International Research will hold The Conference on Marketing on March 20-22 at the Venetian hotel in Las Vegas. For more information visit [www.theconferenceonmarketing.com](http://www.theconferenceonmarketing.com).

The Advertising Research Foundation will hold its annual conference on March 20-22 at the Marriott Marquis Hotel in New York. For more information visit [www.thearf.org/conferences/annual](http://www.thearf.org/conferences/annual).

Britain's Market Research Society will hold its annual conference on March 22-24 at the Barbican, London. For more information visit [www.mrs.org.uk/res06/](http://www.mrs.org.uk/res06/).

The twelfth Sawtooth Software conference on acquisition and analysis of market research data will be held on March 29-31 in Delray Beach, Fla. For more information contact Danell Neibuhr at 360-681-2300 or visit [www.sawtooth-software.com](http://www.sawtooth-software.com).

Salford Systems will hold a conference on data mining on March 29-31 in San Diego. For more information visit [www.salforddatamining.com](http://www.salforddatamining.com).



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# Converting surveys from paper to PDA

Converting intercept surveys from paper and clipboard to PDAs (such as PocketPCs and Palm Pilots) is growing in popularity. The advantages that PDAs offer to field studies are fairly intuitive: streamlined data collection and processing, automated skip patterns and rotations, and fewer data cleaning issues.

Before making the switch to PDAs, however, there are several things to consider: How do questions that can be viewed easily on paper get displayed on a PDA screen? How are open-ends captured? How does one take advantage of automatic branching? How will the interviewer navigate to/from different sections of the survey? How do you manage interviewers to make sure they can use the PDA and traverse the survey correctly?

These are typically the questions that give researchers some reserve about pursuing the use of PDAs. However, all issues are fairly easily addressable and usually just take a little thought and creativity to get

solved.

The key in switching from paper to PDAs is in developing a process that will make the research project flow more efficiently, in terms of getting out into the field, conducting interviews and processing data.

## PDA screen size

PDAs are wonderful tools for interviewer mobility, decreased shipping charges, and overall cost benefits. But the usual screen size of around 2x3 inches is obviously much smaller than paper's 8x11 or even 8x14 dimensions. This causes problems for surveys designed to display multiple questions at one time or which use grid formats for capturing answers.

One way around this limitation is to utilize the scroll bars on the PDA screen. Scroll bars, just like in normal Windows applications, allow the interviewer to move the screen to see more questions. These scroll bars can be tapped using the PDA's pen-like stylus, just as one would click a scroll bar with a mouse.

*Editor's note: Bill Jeffries is president and CEO of AcWire Technologies, a data collection systems company in Wayne, N.J. He can be reached at [bill.jeffries@acwiretechnologies.com](mailto:bill.jeffries@acwiretechnologies.com).*

Another option is to simply display one question per screen. Instead of tapping the scroll bars, the interviewer just taps a navigation button like "Next" to advance to the next question. Oftentimes, this is less error-prone than using scroll bars.

Depending on the PDA being used, and the environment lighting available, font sizes on the PDA can be manipulated to fit more questions onto one screen. This kind of solution would need to be pilot-tested with the interviewers to ensure that a reduced font size doesn't make the survey more problematic.

Also, as described below, there are all kinds of logic flow that can be programmed into the PDA questionnaire. This can be used to limit the questions displayed for the interviewer to only those ques-

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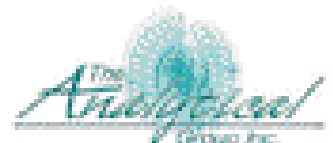


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tions that apply to the respondent. For instance, a survey that displays a long grid of questions could be programmed to only display the applicable questions, based on some type of skip pattern.

### Open-ends

Capturing open-ends is usually one of the first skepticisms that researchers have about PDA data collection. Given that PDAs generally don't have a keyboard attached, it seems that there is no seamless way to enter open-ended answers. However, there are three workable approaches to capturing open-ends.

The most efficient way to capture an open-end is to program the survey to utilize the voice recorder of the PDA. When the open-end question appears on the PDA screen, the interviewer prompts the respondent and then activates the voice recorder. The respondent can then talk naturally and every word is captured accurately by the PDA and linked to that survey.

This type of data capture adds a significant benefit over paper, in that the tone and inflection of the answer can become part of the data. Dard Neuman, vice president of operations for the in-store

research firm SmartRevenue, relies heavily on voice capabilities in SmartRevenue's shopper research. "The ability to integrate voice-recorded open-ends into a quantitative framework allows us to push the limits of questionnaire design."

Saved as .wav files on the PDA, and uploaded to a central server, these voice files need to be transcribed, just as in the case of verbatims from a CATI-based study. Companies have sprung up that focus on processing voice files from PDA-based studies.

The second approach is to capture open-ends in a traditional fashion by writing the answer down on paper. The respondent's identifier, often displayed on the PDA, is written on the paper and linked manually to the survey at the data processing stage of the project. This is usually only a good approach when the question is sensitive, and the respondent may not feel comfortable speaking into a machine.

The third approach is only used for very short open-ends, such as capturing a name or e-mail address. It involves using the "soft" keyboard of the PDA. This electronic keyboard displays on the screen and is tapped by the stylus.

This option is best for open-ends with about 10 or fewer characters in the response.

### Survey flow

The biggest gain in converting from paper to PDA is the ability to program skip patterns. By allowing the PDA to enforce the survey flow, the burden is lifted from the interviewer from manually trying to decipher what question to ask next.

Neuman says, "The ability to have the PDA control the interview process is indispensable, as it allows for more complex branching patterns without fear of human error. In short, this application brings together the branching control of an online questionnaire with the context sensitivity of an in-person ethnography."

Much like converting paper to online or CATI, the survey designer must be very explicit in defining the Boolean statements that will drive the flow of the survey. Long instruction statements to interviewers must be converted into exact Boolean statements (e.g., If Q3>1 AND Q5=2).

Other logic elements that can be programmed into PDAs are section rotations, question rotations, question piping and answer piping. All of these features use Boolean statements to trigger their use.

On a paper survey, the interviewer is often guided, via instructions, through the survey, sometimes back and forth between different sections. In addition, there are cases where a respondent answers some questions, performs some action, and then returns to finish the questionnaire.

With paper, an interviewer can fairly easily flip back and forth between sections, or pull up a respondent's survey to finish the interview. With an electronic survey on a PDA, the researcher needs to develop a way for an interviewer to easily jump between different parts of the survey or even between different surveys.

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The PDA can utilize visual controls such as buttons, menus or dropdowns to give interviewers a way in which to load a different section or survey. The researcher needs to determine a navigation scheme that will be the fastest and most intuitive for the interviewer.

In short, the researcher must take advantage of the fact that the PDA can make an interview much more conversational than paper by smoothly moving in and out of different branches of the survey in a way that is both easy for the interviewer and respondent.

### Interviewer management

Getting field interviewers as fluid and comfortable with PDA surveys as they are with paper surveys is a big challenge that must be met early in the process. The learning curve usually depends on how intuitive and user-friendly the actual PDA software is itself. The most important thing that can happen in this phase is that plenty of time is set aside for interviewers to practice with the PDA and ask all of the questions that may come up once they get into the field.

Virtually all field surveys embed various types of instructions to the interviewer in the survey. For instance, there may be instructions that prompt the interviewer to hand the respondent a visual aid. The trick in embedding these instructions into a PDA survey is including the text without affecting the display of the actual questions and without adding too many more “taps” to the interview process.

### Smooth transition

Taking a very deliberate approach, which includes building in a well-defined training and pilot period, is the way to ensure a smooth transition from paper to PDA. Starting the process by building confidence in the interviewers and the research clients allows research companies the opportunity to accelerate this transition. | Q

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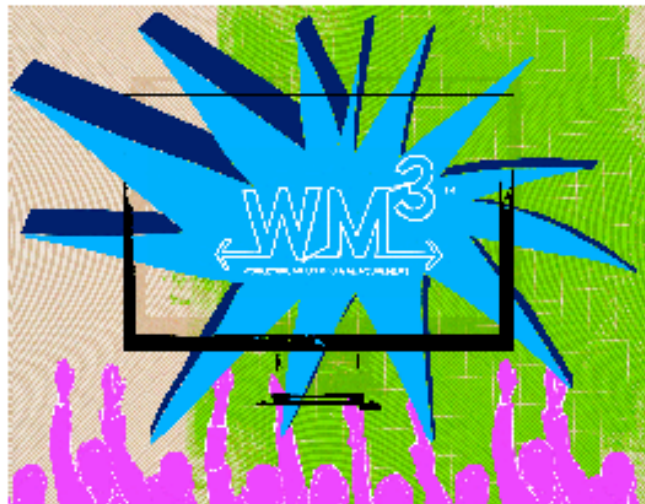
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# Add a bit of quant to your qual

Focus groups have been getting a lot of bad press lately. Malcolm Gladwell has spoken out against them in his book *Blink* and in several recent presentations. *Business Week* celebrated Gladwell's perspective in a November 2005 article entitled "Shoot the Focus Group."

Is it really a good idea to throw away this time-honored research technique? We think not.

It's true that traditional focus groups have limitations. Recruiting is a challenge, sample sizes are small, and projectability to the greater population is an issue. It's also true that the early software for moving focus groups online, which consisted only of chat streams, did not preserve the true goal of a focus group: to get consumers to talk about their feelings, attitudes and opinions using projective and probing techniques.

However, these limitations are fast disappearing.

When focus groups fail, it is usually because they are not properly designed in the first place. Research design for traditional groups is fluid, often only a topical outline. Moving

the same discussion online requires a more rigorous approach.

## **Better focus groups through better design**

Researchers have challenged companies like ours to move traditional research online. To do so effectively, we have had to invent new capabilities. Today's online focus group technology, based on Web conferencing software, goes well beyond chat to include capabilities such as annotation and drawing tools that can be used for collaborative exercises. This makes it possible for qualitative researchers to design creative projective and probing exercises that duplicate the best aspects of traditional focus groups.

When it comes to recruiting, online focus groups present an advantage. Because in-person focus groups require participants to be in the same geographic areas, it is often not possible to attain samples that reflect a company's true market segments. Geography becomes the primary segmentation by default. With online focus groups, geography is no longer the primary consideration, since par-

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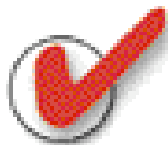
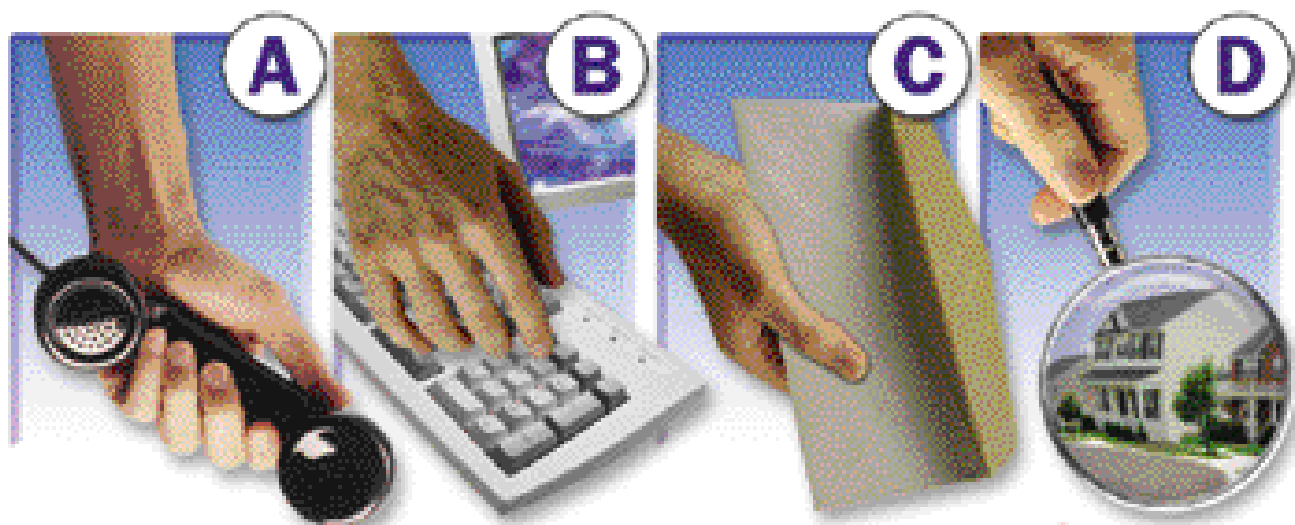
ticipants come together virtually rather than in a brick-and-mortar facility. By eliminating the geographic constraint, focus groups can be conducted among whatever populations are most meaningful, no matter how far-flung. And by taking advantage of the availability of online consumer and business-to-business panels, recruitment based on sophisticated segmentation is relatively easy to accomplish.

It's crucially important when conducting a focus group to make sure that the right people are in the group. Participants must be fully qualified for the research being conducted. One way to ensure that the group includes the right people is to use a research design that includes a quantitative as well as a qualitative component.

## **Finding the right people**

Consider for example a major retailer

# The answer is:



## ALL of the above.



The research data collection world grows more complicated every day thru technology, legislation and changing concerns about privacy. Anti-spam, Do-Not-Call, wireless phone rules, anti-fax laws, abandonment rates, virus concerns and the like now fill the researcher's "worry list" just as much as representation, projectability and bias. All too often, researchers are presented an "answer" which has more to do with a vendor's business model than it does their research challenge.

At GENESYS, our only preferred methodology is the one that meets the needs of your particular project.

It's clear that the very best way to interact with respondents is **the way they want**. Despite the buzz in recent years over the rise of some methodologies and the "imminent demise" of others, we know that the best design is, and always has been, the one that delivers the best rate of response from as representative a sampling frame as possible, in a cost-effective manner.

The concept of *Respondent Preference* has entered the sampling world. On many studies, researchers now realize that they must

vary their approach to provide respondents with choices. While *Mixed-Mode* designs can be more challenging to implement, they can reward researchers with more representative results and the reduction of biases resulting from non-response.

At GENESYS, we've built a "toolbox" of unique capabilities and design options to meet any research need. As the leader in sampling with Government, Social Science, and University researchers, we've developed a number of inventive designs that can maximize rates of response and representation, while providing true respondent choice in data collection. Along with years of methodological leadership and design expertise, the GENESYS household sampling toolbox includes:

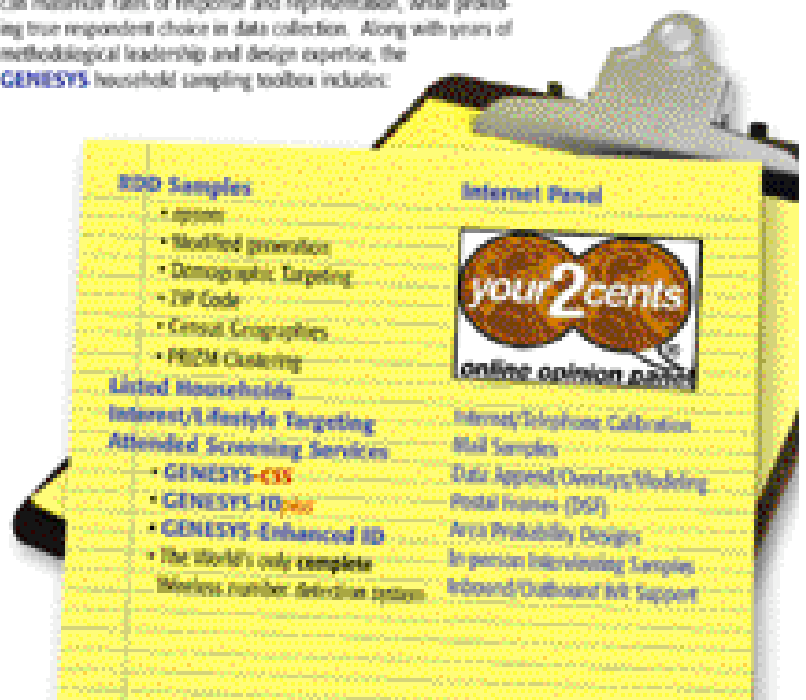


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that was interested in learning about online shopping. A clear understanding of cross-channel shopping behavior is important to retailers today, as they struggle to make the right investment trade-offs between brick-and-mortar retail establishments, Web-based shopping environments and catalog sales. This retailer was interested in using online focus groups to gather perspectives from light, medium and heavy users of online shopping. Artafact was asked to recruit to these three segments. Because of our experience with the Artafact hybrid methodology and our knowledge of how quickly the use of the Internet changes, we recommended that these segments first be validated.

To do so, we added a short quantitative survey to the project, asking about online shopping habits. From the resulting data, we derived the correct characteristics of the three segments of interest. Light online shoppers used the Internet for shopping less frequently than the firm had assumed, and the heavy-use segment used the Internet much more. Had the groups been conducted without benefit of the quantitative data, the retailer would have run the risk of talking to the wrong people and basing their directional decisions on bad data (which is of course worse than

no data at all).

This process of refining the segmentation before conducting the groups is available for little or no additional cost. That's because the recruitment process for a focus group already includes a screening survey to ensure the proper demographics for the project. By thinking through the segmentation issues in advance, it is easy to add additional questions to the screener survey in order to refine the criteria and perform better focus group research.

### Complementing online surveys with deeper insights

The example above shows how a quantitative element can add tremendous value to a qualitative project. The reverse is also true. Qualitative research can be used to answer the questions left unanswered by quantitative research.

For example, Artafact partner BIGresearch, which provides syndicated data, now supplements its quantitative research with Artafact online focus groups when the topic warrants this approach.

One such topic is the BIGresearch study of RFID, which is the first study to track consumer attitudes about this emerging technology. RFID (radio-frequency identifica-

tion) allows manufacturers, distributors and retailers to better manage inventory by attaching a tiny tracking device to products. Because it is not well understood by most consumers, this technology is often viewed with suspicion. Unlike a survey, an online focus group allows a dialog with consumers about their fears and concerns. By adding qualitative research to this study, we were able to articulate why consumers held certain beliefs about RFID, including what was most feared and hoped for as a result of this emerging technology.

### Taking advantage of a new medium

Online research is enabling both new technologies and new methods. Approaches such as our hybrid methodology allow researchers to make the most of online research by combining traditional methods in new ways for better results than ever before.

In some cases online focus group technology is enabling entirely new types of projects. As an example, take the ability of some online focus group software to access the Internet directly from within the tool. This is useful for research that includes online assessments, such as a project we recently performed for a consumer firm that wanted to research the usability of an online product.

Participants in this online focus group took a trip to the Web and used the online product while the researchers watched from Artafact's virtual back room. Using our annotation tools, participants showed us exactly what they liked and disliked about the online products. The moderator was then able to engage the participants in a conversation about the findings. This project combined usability and discussion in a way that would not have been possible in a traditional focus group.

It's ironic that after all these years, focus groups are starting to get a bad name just when they're really getting good. In our view, the demise of the focus group has been greatly exaggerated. | Q

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# Laying new TURF with NCURA

**N**CURA (non-cannibalized unduplicated reach analysis) is a new technique that provides TURF-like results but which better facilitates the modeling of optimal product mix strategies. This is accomplished by evaluating consumers' purchase decisions for possible cannibalistic substitutability among options. NCURA provides modeling solutions to help decide what combination of products to "shelf" together and the impact of trading out one variety for another. Conversely, it also indicates which products are highly cannibalistic of each other and therefore not necessary to stock in order to obtain maximum unduplicated reach.

TURF (total unduplicated reach and frequency) has become a widely used market research tool over the past several decades. Not only has TURF gained in popularity, but extensions and variations on the theme have been made, dependent upon the specific research agenda being addressed.

While TURF is successful at what it proclaims to do, algorithms have been created in order to improve the standard TURF model by adding factors

intended to mimic real-world market activity, while simultaneously providing more information than originally possible with TURF. NCURA provides a similar basic output as does TURF, but several other critical factors are taken into account when producing this output. Additionally, NCURA provides other critical results that TURF cannot provide, thereby offering an important marketing advantage.

To illustrate this technique, we will be analyzing 20 different cookie varieties and the market reach associated with different combinations. Our database contains data on all 20 cookie varieties, as evaluated by 500 respondents. All cookie varieties were rated on a 5-point scale with regard to the following question:

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Additionally, the cookie manufacturer is looking to establish two different marketing schemes: one for large supermarkets, where they have a much larger shelf space available, and a second for smaller corner-stores, where they may only be able to stock only three to five types of cookies. An additional concern the manufacturer wishes to address is, what happens if the favored cookie flavor is temporarily out of stock? What should it be replaced with so as to lose as few sales as possible?

**"Please rate the following cookie with regard to your likelihood to purchase it."**

Definitely Would Purchase	Probably Would Purchase	Neutral – May or May Not Purchase	Probably Would Not Purchase	Definitely Would Purchase
5	4	3	2	1

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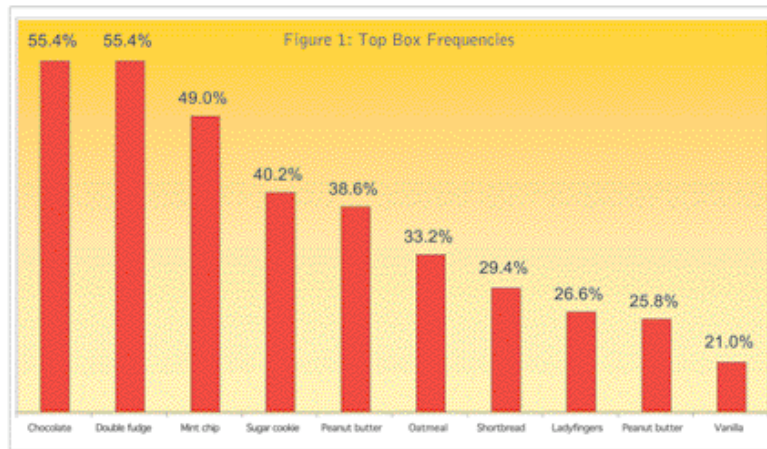
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### Comparing NCURA and TURF

While NCURA provides output similar to TURF, it seeks to incorporate a more real-world scenario and further provides directly valuable analysis that is impossible to accomplish with the traditional TURF model alone.

One concern many researchers have had with the standard TURF analysis is that it fails to accurately identify what should happen if the top-rated product is not available without completely rerunning the model. Perhaps a shipment is late, the manufacturer is out of stock, or a senior v.p. shoots down a top-rated product for some reason. NCURA provides a “possible substitution” alternative showing, in effect, what is the best marketing recommendation if one wishes to substitute one cookie variety for another.

Additionally, NCURA not only tells you what products to include in your sales mix, but also provides important insight into what units not to include. Recommendations on excluded units are not based simply on low consumer scores but rather on common statistical techniques that provide the client with a comprehensive list of what varieties are so similar in terms of market reach that there is no significant increase in terms of market share if they are included on the shelf. This is especially useful for the situations where shelf space or production capacity is limited.

### An NCURA example

First, we will examine the simple top box purchase intent score proportions of all cookie varieties (i.e., the percentage of the sample which stated that they would “definitely” purchase the

variety of cookie). The Top 10 cookie varieties (in terms of top box scores) are shown in Figure 1.

If we were to stop our analysis here and draw our conclusions, we would want to stock chocolate chip, double fudge, mint chip and sugar cookies, and if space provided, the other six highest top box frequencies as well. However, this is not taking into account any possible demand duplication. For example, a significant proportion of people who rank chocolate chip as a 4 or 5 also rank double fudge as a 4 or 5, which may indicate that the two are very close substitutes for one another. This means that if chocolate chip were not available, it might be that customers would be just as happy with double fudge. Therefore you wouldn’t need to stock both flavors in order to make a sale.

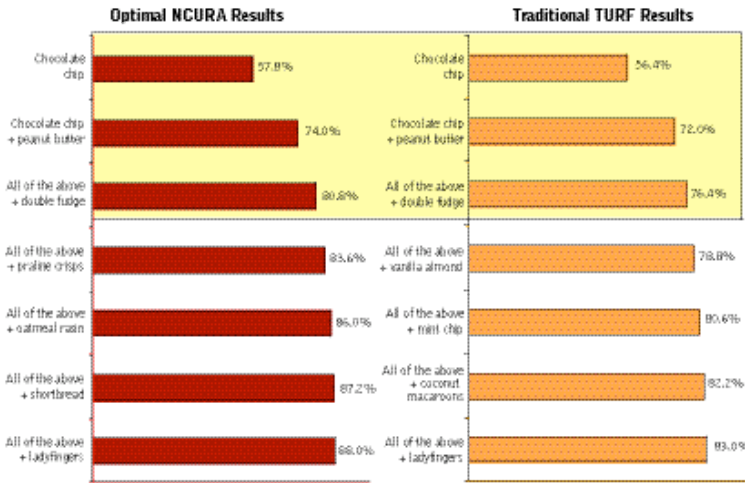
If we are trying to gain optimal market share with the fewest number of varieties, we need to isolate cases and remove close substitutes which do not add marginal sales. The ultimate goal is to provide a cookie display that garners the maximum share of the market, not just to display the highest-rated cookie varieties.

Clearly, TURF would provide this information. However, TURF would not provide possible substitution recommendations, nor would it tell us what cookie varieties are relatively unimportant to stock (assuming limited shelf space once again) even though they score highly with regard to top box frequency.

After running the NCURA analysis, we find the optimal combination of cookie varieties to display in order to



Figure 2



obtain the largest proportion of market share, as shown in the left side of Figure 2. What we have found is to be expected: as we add more and more cookie varieties, it becomes a game of diminishing returns with regard to proportion of market share captured. On the surface, the results in Figure 1 look very much like standard TURF results. However, comparing our results with

standard TURF output reveals the differences (Figure 2).

What we see is that the top three cookie varieties are the same using both TURF and NCURA (note that this area is denoted by the yellow shaded region). The first difference we see is that TURF provides a reach of 55.4 percent, while NCURA provides a reach calculation of 57.8 percent. This

is due to the fact that NCURA takes into account more complex substitutability interactions.

This tends to better mimic real-world market activity. How many times have we all gone to the corner store to pick up a certain variety of cookie (or flavor of ice cream) only to find that our first choice isn't available? Did we leave empty-handed or was there another variety that we chose instead? For many categories, there will be something in the mix that will still satisfy our craving.

Note also that looking past the top three cookie varieties, we begin to see completely different patterns emerge. NCURA advocates for replacing vanilla almond cookies (from the standard TURF results) with praline crisps. This is due to the aforementioned deeper modeling of inter-substitutability.

As mentioned previously, NCURA also provides insight into intelligent, actionable alternatives if, for some reason, chocolate chip cookies are unavailable. The NCURA model indicates that if we wish to find an accept-

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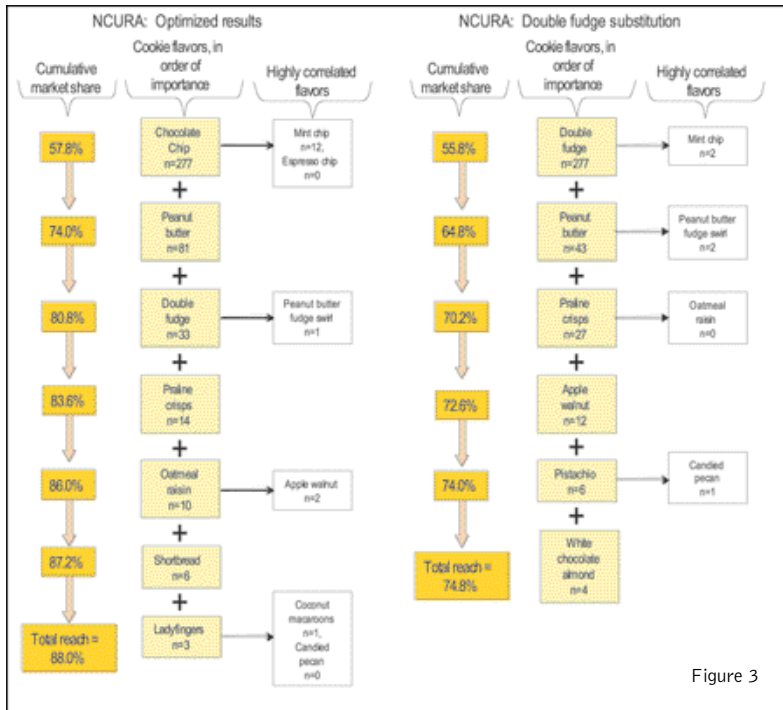


Figure 3

able substitution for chocolate chip, we should consider double fudge cookies. In Figure 3 we see a comparison of the optimal NCURA results and results

obtained from substituting double fudge for chocolate chip. Statistical note: The reader will notice that in the optimized NCURA

results, we find that peanut butter fudge swirl is a strong correlate to double fudge. When we substitute double fudge for the chocolate chip, however, some of the flavor correlates change. This is because when we identify a highly desirable flavor (that would likely result in a sale), all those people with a satisfied demand are removed from the subsequent steps of modeling. When flavors are substituted for those in the optimal mix, different people are removed, so the remaining flavor substitutability structure is changed.

Note also the columns labeled "highly correlated flavors." These are flavors that are so similar in respondent-level scores to the main cookie flavor that we advocate NOT including them on the shelf (unless there are no restrictions on the amount of shelf space available, in which case all varieties should be stocked). Further, respondents score "highly correlated flavors" so similarly to the parent flavor that, for example, even though 55.4 percent of respondents indicate they

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definitely would purchase chocolate chip, store owners are likely to see that 57.8 percent of respondents will choose chocolate chip if mint chip and espresso chip are not available. In this case, we recommend not stocking mint chip and espresso chip cookie varieties due to the high correlation of respondent attitudes amongst these cookie varieties.

#### **NCURA simulator: additional insights and the online environment**

NCURA has been used to produce an online simulator which allows researchers to directly probe NCURA results for any possible combination of variables entered (cookie varieties, advertising messages, sports car features, etc.). This is a critical tool for meeting the demand-based needs of smaller stores, or any other situations where shelf space is limited. The client can choose to see the top three, four, or n number of variables displayed along with the associated output scores. Additionally, the user can input the variables of their choice (say apple walnut, candied pecan, and oatmeal raisin) and obtain the overall unduplicated market reach, possible substitutions, and highly correlated variables for the combination of their choosing. This allows for virtually unlimited analysis (limited only by the number of variables, or cookie varieties, in the database). Additionally, the simulation tool allows respondents to look at any possible subset of the data (such as how men and women compare, different age groups and their associated preferences, regionally based preferences, etc.). One particularly nice feature of the online simulation tool is that it allows users to upload databases in real-time, thereby allowing for the monitoring of time series-based trending of changing market behavior over the course of any desired time period. Clearly, consumer (or business-to-business) markets are not static environments, and the ability to track changes over the time allows for up-to-date, intelligent marketing changes.

NCURA is a tool not only for cookie varieties or ice cream flavors, but also for messaging strategies. For

example, if an automobile manufacturer wants to market a new car through direct mail and television commercials, two very different marketing strategies emerge. When using direct mail, space is less limited, and potential consumers may view the messages as many times as desired. This is equivalent to stocking cookie varieties in a major supermarket where shelf space is abundant. When the automobile manufacturer wants to consider marketing strategies for a television commercial, other con-

cerns emerge. When using a television commercial, if too many messages are conveyed consumers tend to forget those messages shown towards the beginning of the commercial in favor of messages conveyed later in the commercial. NCURA provides a tool whereby a savvy automobile manufacturer may consider different combinations of three to five messages, thereby creating as much interest as possible given the constraints of television commercials. | Q



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By Tema Frank

online research

# What works when?

First, the good news: companies are increasingly recognizing that Web sites are too important to be left strictly in the hands of programmers and also that market research is essential to effective Web site design. The bad news: there is a bewildering array of techniques being touted to assess a company's Web site effectiveness. How do you know which to use?

This article discusses different approaches to getting feedback on your Web site. In an ideal world, you would use each of the techniques discussed in this article at some point during your Web site's

life cycle. But this isn't an ideal world, and odds are you don't have the time or the budget to do them all. So how do you decide?

The type of testing you do should depend on a combination of your organization's stage in the Web site life cycle and your goals for testing. Realistically, it will also be influenced by cost and time pressures.

## An overview of Web site assessment techniques

*Editor's note: Tema Frank is president of Web Mystery Shoppers International Inc., Edmonton, Alberta. She can be reached at 866-211-7027 or at [tema@webmysteryshoppers.com](mailto:tema@webmysteryshoppers.com).*



This article examines six Web site testing methods:

1. Focus groups (in-person or online)
2. Lab-based usability testing
3. Web-based (pop-up) surveys
4. Metrics/analytics software
5. Unsolicited customer feedback
6. Remote usability testing

#### Focus groups

Most market researchers are already familiar with focus groups, and so they naturally gravitate to using them to get qualitative feedback on Web sites. Such focus groups typically involve six to 12 people, who may be chosen from your existing customer base or recruited externally. They are brought into a meeting room where they have a group discussion, led by a moderator, about the Web site. If the site does not yet exist, they may be asked what they would like to see in such a site. They may be shown page mock-ups, drawings, or led through an card-sort-

ing exercise which is intended to help the site designers figure out how users would interpret various topic labels and how they would organize the information.

As with typical focus groups, the client may be behind a one-way mirror and the facility may be set up in such a way that the client can ask the moderator (who is wearing a headset) to ask specific follow-up questions. Costs are based on a combination of recruitment costs, participant expenses and consulting-related fees that may be charged by the company running the focus group. Typical focus groups cost between \$3,000-\$8,000 per group, which includes a fee of typically \$50 to \$100 per participant.

#### *Advantages of focus groups*

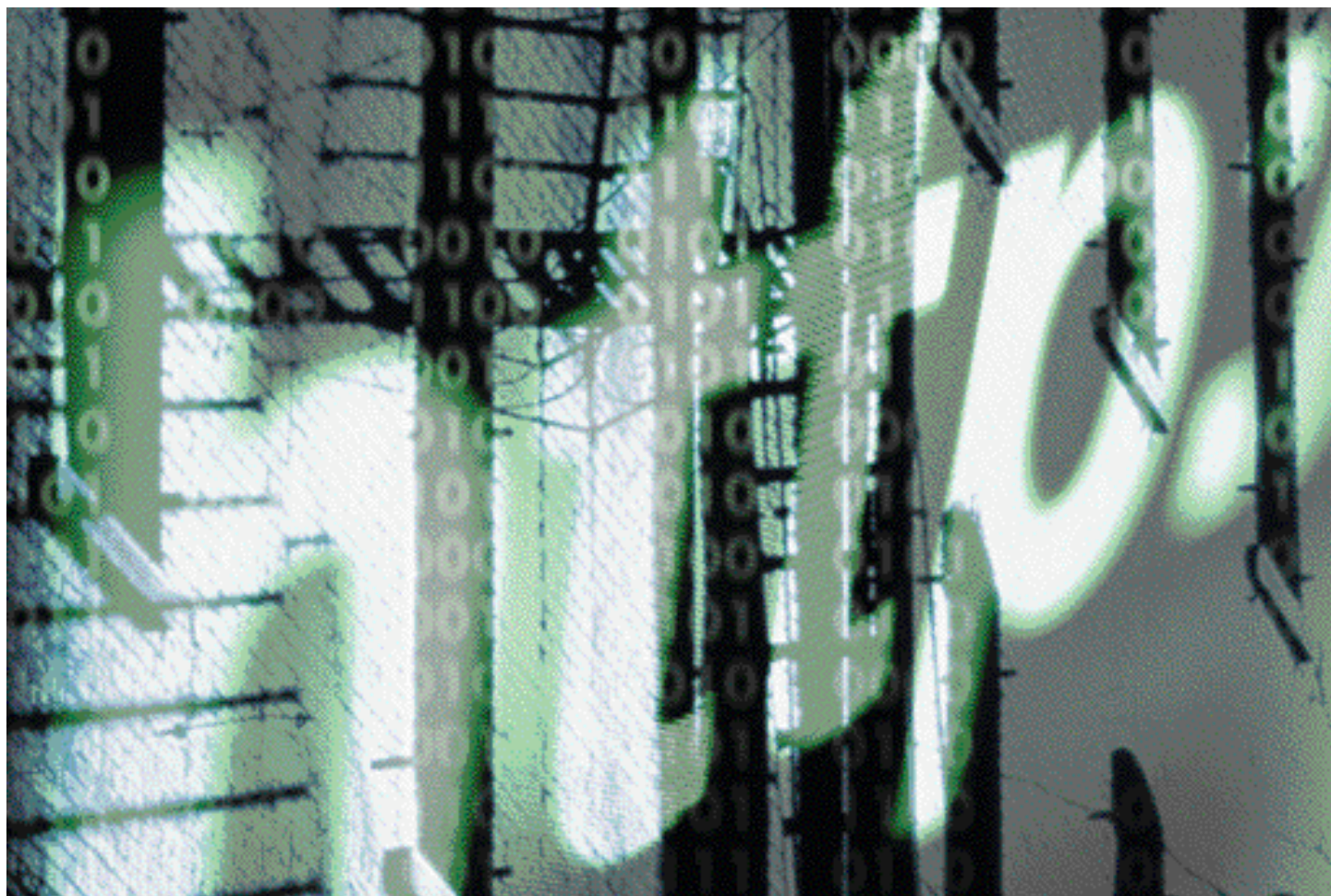
- Client gets to watch participant reactions, and may be able to have moderator ask follow-up questions.
- Participants can play with the content – for example, rearranging cards in

an order that makes sense to them.

- Can be done early – before money has been spent on programming.

#### *Drawbacks of focus groups*

- User's guesses as to how they would use the site are very different from reality.
- Will miss most navigational problems.
- Risk of group-think. What people say is influenced by the others in the room.
- Risk of poor moderators. Need a good moderator – must not bias the conversation, but ensure no one dominates.
- Participants limited by geography, time and willingness to travel to the testing location.
- Often either no transcript available, or significant cost or delay to get a transcript.
- Poorly constructed participant group can negate the value (i.e., respondents must be like your target customers, and not so familiar with



your site or company that they are unable to view the concepts with fresh eyes).

Focus groups are useful when you are in the very early stages of making a Web site plan to get rough idea of desired content. They can help with the conceptual, brainstorming work. They can also help when you want to assess emotional reactions to colors or visual treatments and you don't have the time or funding for individual interviews.

Online focus groups

A variant of traditional focus groups, online focus groups allow participants to log in from their own computers at a pre-arranged time, and the discussion uses a chat room approach. In the more sophisticated set-ups, participants can view materials that the moderator displays on the screen and possibly go back and forth between the chat room and the viewing screen, or see both at once.

*Advantages of online focus groups*

- They overcome geographic limitations of traditional focus groups.
- Real-time transcript is available for analysis.

*Drawbacks of online focus groups*

- Cannot do physical activities such as card-sorting.

Comparison of Web Site Testing Techniques

	Large Sample Size Remote Usability Test	Lab-Based Usability Test	Focus Group (live)	Focus Group (online)	Pop-Up Surveys	Metrics/ Analytics Software	Unolicited Customer Feedback
Unbiased, representative sample	•					•	
Realistic view of actual user paths	•	•				•	
Uncovers navigational problems	•	•				•	
Transcript available for details	•	with delay	with delay	•			
No IT involvement to implement	•		•				
No risk of group-think	•	•			•	•	•
Uncovers computer-related problems	•					•	
Large sample size	•				•	•	
Test in customer's real environment	•				•	•	
Statistical data	•				•	•	
Qualitative data	•	•	•	•			•
Can test and compare to competitors	•	•					
Can be done before go live	•		•				•
Can see reactions		•	•				
Can ask user follow-up questions		•	•	•			

- Hard to follow the flow of conversation.
- No facial expressions or tone of voice.

Online focus groups are useful when you are doing early-stage testing for a teen-oriented site, for example. Teens tend to be the group that is most comfortable with online chat, and they may prefer the semi-anonymity of this format to a traditional focus group. For most other users, this is not an ideal format.

Lab-based usability testing

Users are brought into a testing lab,

one at a time. A typical session lasts one to two hours with each user. The lab may be configured to resemble an office or a home. The participants work on the lab's computer (there may be a choice between a Mac-based OS and a Windows-based system), and are asked to vocalize their reactions ("think aloud").

The client can usually watch behind a one-way mirror. As with a focus group, there may be a moderator present in the lab with the user, who can prod for further insight, ask follow up questions, or, in extreme cases, give permission for the user to give up and try something else.

In some labs there is also a video camera taping the participant's facial reactions, and some form of click-stream monitoring (tracking of where the person clicks or scrolls on a page).

Given the intensity of this type of testing, there are usually only a handful of people tested. The traditionally accepted minimum was five testers, but current research suggests that this is far too few for today's complex Web sites. The problems identified by the first few users may not reflect the most important problems in need of repair.

A typical set of lab-based tests with five to 10 users will cost in the range of \$20,000-\$100,000, depending on the degree of consulting that is included in the project and the market clout of the testing company.

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#### *Advantages of lab-based usability testing*

- Users are interacting with the real site, so you can learn about navigational problems.
- Can ask the users questions as they interact with the site, so they can explain surprising actions.
- Because you see the user's facial expressions and hesitations, you get a sense of the frustration level and uncertainties experienced by the user.

#### *Drawbacks of lab-based usability testing*

- It is a stressful, unnatural environment. Research clearly demonstrates that stress affects performance.
- Respondents must use an unfamiliar computer, which will cause frustrations that the user would not encounter on his or her own computer.
- Most lab-based computers are more finely-tuned and using more current software than most users' real computers, so many errors users encounter in real life will be missed with this approach.
- Users need to be willing and available to come to the lab. This causes a skew in who is willing to participate.
- Geographic limitations. Most labs are in major cities. But are all your users?
- Small number of users tested. Are the problems the first five to 10 people encounter typical?
- Often expensive, particularly if a transcript is prepared and analyzed after-the-fact.

Lab-based usability testing is useful when you want to see users' facial reactions and hear their vocalized thoughts. One strength is that you can intervene to ask questions about why they are doing what they are doing if they have not explained something to your satisfaction. (But there's a risk of changing how they behave if such questions are overdone.) Obviously you need to have at least a "draft" site available for on-screen use. They work best if your anticipated site users are a homogeneous group, so that it is possible to recruit a small but representative sample.

#### Web site (pop-up) surveys

There are many companies that offer

surveys which can either be mailed to site visitors after the fact or that pop up on site while the visitor is using it. Mailed surveys are typically too long after the fact to yield any meaningful results for Web site assessment. At most you will get vague, general feelings about the overall experience ("It left me feeling frustrated" or "It was OK").

Pop-up surveys are programmed to either pop up for every visitor, or for every nth visitor, or for visitors to specific pages. Visitors are asked if they will participate in a survey and are sometimes offered a chance to win a prize as an incentive for participation. The survey asks a few questions about the site experience. Generally, a maximum of about five minutes of questions and answers is the longest you can expect people to stick with such a survey.

Costs vary from small, free surveys offered by companies such as Zoomerang to sophisticated surveys that change the questions asked depending on previous answers and have a lot of built-in analytic tools. The latter type of survey can easily cost in the \$10,000-\$20,000 range. Because a heavily trafficked site will usually be able to collect a large number of responses very quickly in this way, pricing is often quoted on a per-respondent basis.

#### *Advantages of Web site (pop-up) surveys*

- Large numbers can be surveyed.
- Fast turnaround.
- Low cost/respondent.
- Actual site visitors responding.
- Questions can be changed often.
- No need to pay respondents.

#### *Drawbacks of Web site (pop-up) surveys*

- Survey fatigue: people are less willing than they used to be to spend time answering such surveys.
- Bias in who replies. Respondents are more likely to be new Internet users, as they are less likely to have become accustomed to being asked their opinion on Web sites.
- Intrusive; it may annoy site users. (Note: One common mistake is to ask visitors for their opinion before they've had a chance to explore site!)
- Increasing prevalence of pop-up stoppers is making it harder to get results.
- Very limited number of questions feasible, so you cannot get in-depth responses.
- No tracking of the path taken and the customer's reactions as they moved along that path.
- Requires special coding be placed on your site. This places demands on your IT department.

Web site (pop-up) surveys are useful once the site is already live and getting

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large numbers of visitors. They'll give you feedback quickly, but not in-depth. You'll get general reactions to the site. Our research suggests that most of those who are willing to fill them out will be fairly new Internet users, so these surveys won't be as helpful if you are targeting a market of experienced or heavy Internet users.

#### Metrics/analytics software

Your Web site hosting company should be able to provide you with some basic statistics about who is visiting your site: how many unique visitors, which pages they are visiting, where they came to the site from, etc. Metrics or analytics software consists of sophisticated versions of these server logs. Some can track clickstream details (what pages people clicked on and in what order) and analyze patterns and drop-off points. They can usually track which pages were reviewed and the average length of time spent per page.

They are useful in conjunction with other methods, but you are left to infer customer motivations. They may tell you, for instance, that 63 percent of your site visitors abandon your site at the first page of your order form. You have no way of knowing whether they are leaving at that point because the page isn't displaying properly on

the screens of Windows XP users, or if they couldn't find information about shipping costs and were unwilling to continue without knowing that, or if they pressed the wrong button and then decided it wasn't worth the hassle to go back and re-enter the information, etc.

Costs for such packages range from the free basic statistics provided by many site-hosting companies to sophisticated programs in the tens or hundreds of thousands of dollars.

#### *Advantages of site metrics/analytics programs*

- Can provide detailed statistical information on your actual site visitors.
- Can help you identify problem pages.

#### *Drawbacks of site metrics/analytics programs*

- The volume of statistical data can be overwhelming. Many site owners find it impossible to interpret, and end up ignoring most of it.
- Does not explain why visitors are behaving as they are.

Site metrics or analytics programs are useful when you have the staff and budget to do sophisticated analysis of the data and can combine it with qualitative information gained from

other approaches. At a minimum, you should analyze whatever data you can get free from your Internet hosting company.

#### Unsolicited customer feedback

Almost everybody gets some feedback on their site. From family and friends to site visitors who feel strongly enough that they'll take the time to send you an e-mail or fill in a comment form, people will give you their opinions. If you have a call center, you can also learn a lot about peoples' reactions to your site from analyzing the help requests that relate to the Web site.

Since you get it, use it. You may get some gems from this sort of feedback. The big mistake site owners often make, though, is assuming that what they hear from such channels is typical, and that they thus know all they need to know about what people think of their site. Wrong! The people who take the time to comment are not typical of the general public. They are a vocal minority who tend to perceive things in more extreme terms than most, and who have enough time on their hands that they consider it worth the time to comment.

#### *Advantages of unsolicited customer feedback*

- Minimal cost.
- Real users.
- Chance to repair relationship with dissatisfied customers who take the time to comment.

#### *Drawbacks of unsolicited customer feedback*

- Biased sample.
- Miss many issues.
- Analysis can be costly in large organizations.
- You must respond quickly and well or your lack of correct response will make matters worse.
- Often you will not learn exactly where the problem occurred. The comments are frequently too vague to be useful.

Unsolicited customer feedback is useful when making minor adjust-

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with Nose Rings Who Loved Our Last... }  
- VP Market Research

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ments to the site as you go along, and as part of the input for redesign. If tracked, it also helps ensure a good linkage between customer service staff and site promises.

#### Remote usability testing

A newer approach is what's called remote usability testing. Some people mistakenly call online focus groups remote usability testing, but, as discussed earlier, focus groups help you

develop concepts but do not help learn about the actual usability of a Web site.

One remote usability approach is to work one-on-one, as in a lab-based usability test, but with the testers working from their own computers and either talking by phone or through online chat with the interviewer while they work through the site. Typically this uses technology that allows the interviewer to see the same screen as the person doing the testing. Let's call

this one-on-one remote usability testing. The advantages and drawbacks of this approach are similar to lab-based usability testing, except that you can use testers from any geographic region. You may or may not be able to see their facial expressions, depending on whether they have also set up a camera to record the user's face. Clearly, setting that up requires a level of complexity that will put off most users, unless the market researcher is there to set up the equipment for the user. But having to send the market researcher to each user's home or office negates the cost savings of such an approach, and the intrusiveness of the market researcher and/or camera and recording equipment detracts from the benefits of testing in the user's natural environment.

Another approach is to have large numbers of people (typically 30-200) work independently on their own computers to try to complete tasks at the site, and report on their progress by answering questions as they go through the site. Since they are expected to devote much more time to the process than is expected in a pop-up survey, they are usually paid \$10-\$20 for their effort. We'll call this "large sample-size remote usability testing" (LSSRUT).

#### *Advantages of large sample-size remote usability testing*

- No geographic or time-based limitations.
- Collect lots of detail as they go.
- Includes both qualitative and quantitative information.
- Realistic setting; low stress.
- Wide range of computer systems; uncover problems faced using buggy personal computers .
- No demands on IT department. (Depending on system used to collect the information.)
- If a system that does not involve the IT department is used, it allows benchmarking - both against competitors and to compare present and future performance. The large sample size, if properly recruited, provides statistical validity.

#### *Drawbacks of large sample-size remote usability testing*

- May involve imperfect click-stream analysis. In some systems, the

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testers must report on where they clicked rather than having it tracked automatically. Those that do track it automatically require that the users download special software to do so. This skews the sample, since many people are now reluctant to download software.

- Cannot see facial expressions.
- Needs reasonably literate testers.

They have to be able to express their thoughts in writing.

- Site needs to already be accessible online (even if only on a test server).

LSSRUT is useful when a current site or a draft version of a new site is accessible online and you are preparing for a redesign or double-checking and fine-tuning a design before or after launch. If it is set up in such a way that no special scripts need to be inserted into the Web site being tested, it can be used for research on competitive Web sites and for benchmarking. It can also be used to monitor and reward customer service staff, if site testers also check on e-mail handling and/or call-center replies to questions about the Web site. It is particularly valuable if you need either a wide range of testers (e.g., people from across North America) or a specific type of testers (e.g., rural New Mexicans aged 50+).

## Which are best?

Which techniques are best at what stages? In a nutshell:

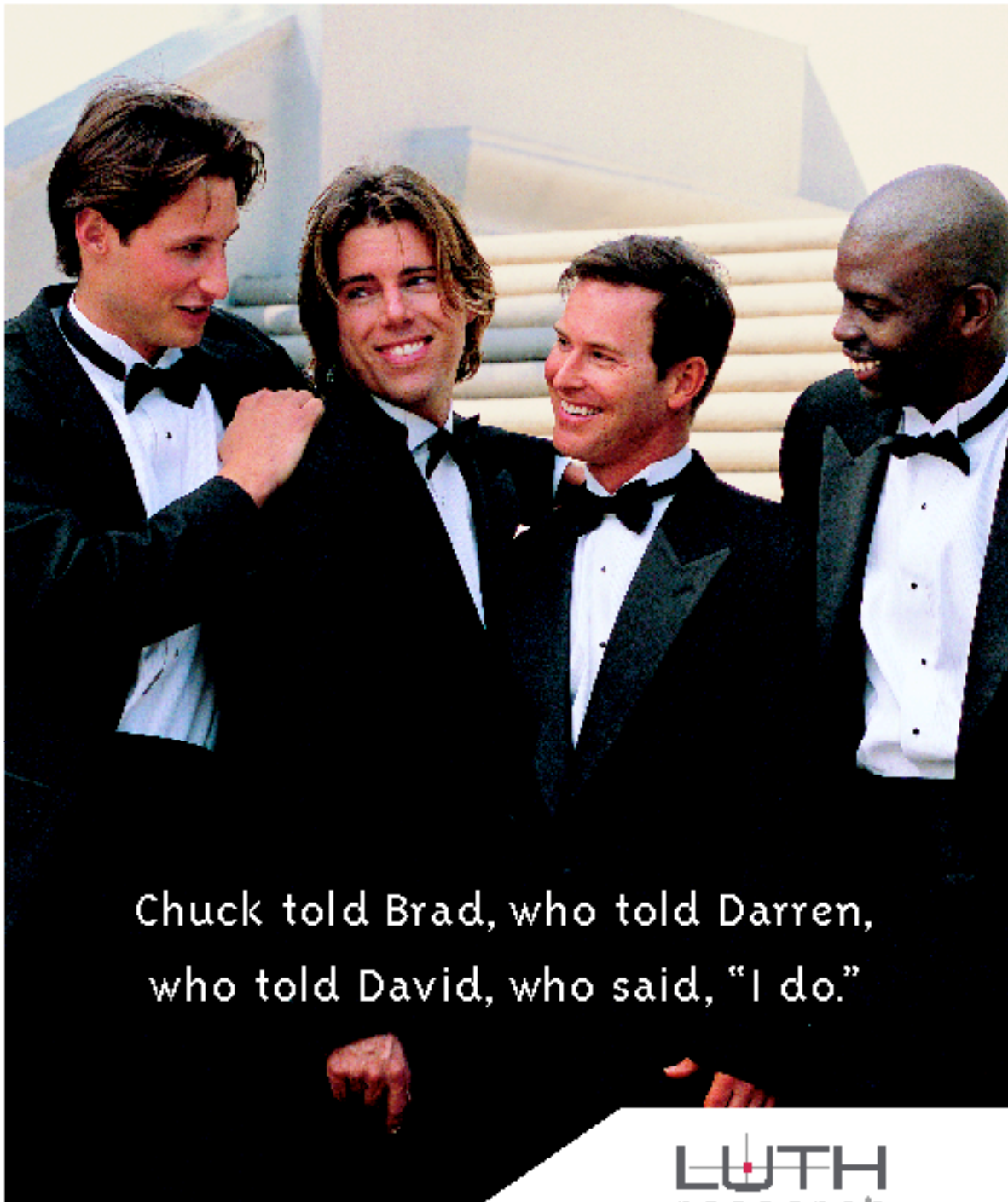
- Concept development: use focus groups, plus feedback from clients and current customers.

- Once online (test or live server): use lab-based testing if you need to see facial expressions; otherwise consider alternatives that take place in a more natural setting, such as remote usability testing.

- Ongoing: pop-up surveys if and when needed; Web analytics/metrics, collect and analyze unsolicited feedback; use LSSRUT to ensure no slipping and for competitive analysis.

- Redesign: use LSSRUT, lab tests and data from ongoing metrics before redesigning so your organization doesn't throw out the baby with the bathwater! | Q





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# Do some online interviewing of your own

For four years I have purchased the same brand and model of running shoes, the New Balance 991. However, after my second knee surgery I decided I might be due for a change. I went shopping for a shoe that was a perfect fit for my running style and would give me the support I needed. I was amazed by all the choices I had. I didn't know where to begin.

I often get the impression market researchers feel the same way when they are looking for the perfect online data collection vendor. In the last three years the number of companies offering a variety of services has tripled. Figuring out how to differentiate between the offerings and the quality of those offerings is no small task when researchers are being called on by so many different companies. Because I was wishing I had my shoe issue of *Runner's World* with me as I was staring at the racks of running shoes, it dawned on me that it might be helpful to develop a checklist of questions to ask potential online partners. I came up with these questions by listening and asking - listening to my prospects as I spoke with them for the first time, and directly asking people in the industry, who do a lot of online, to tell me what is important to them. The same issues came up over and over again and it was not difficult to narrow it down to the following 10 areas of concern.

## 1. What services does your company provide?

This is the best place to start because there is great variation among what vendor companies are offering and what research companies need. There are service bureaus offering one-stop shopping. Deliver a final survey to them and they will deliver data to you and do everything in between. They supply sample or work with client lists, they program and host. Many also offer tables, coding and weighting. But

not every company needs or wants this full-service option and there are many choices for just programming or just sample. Match the offerings to your needs and then ask the more specific questions.

## 2. How large is your panel?

This seems like a simple question, but panels actually count their

## The top 10 questions to ask prospective online vendors



By Janet Savoie

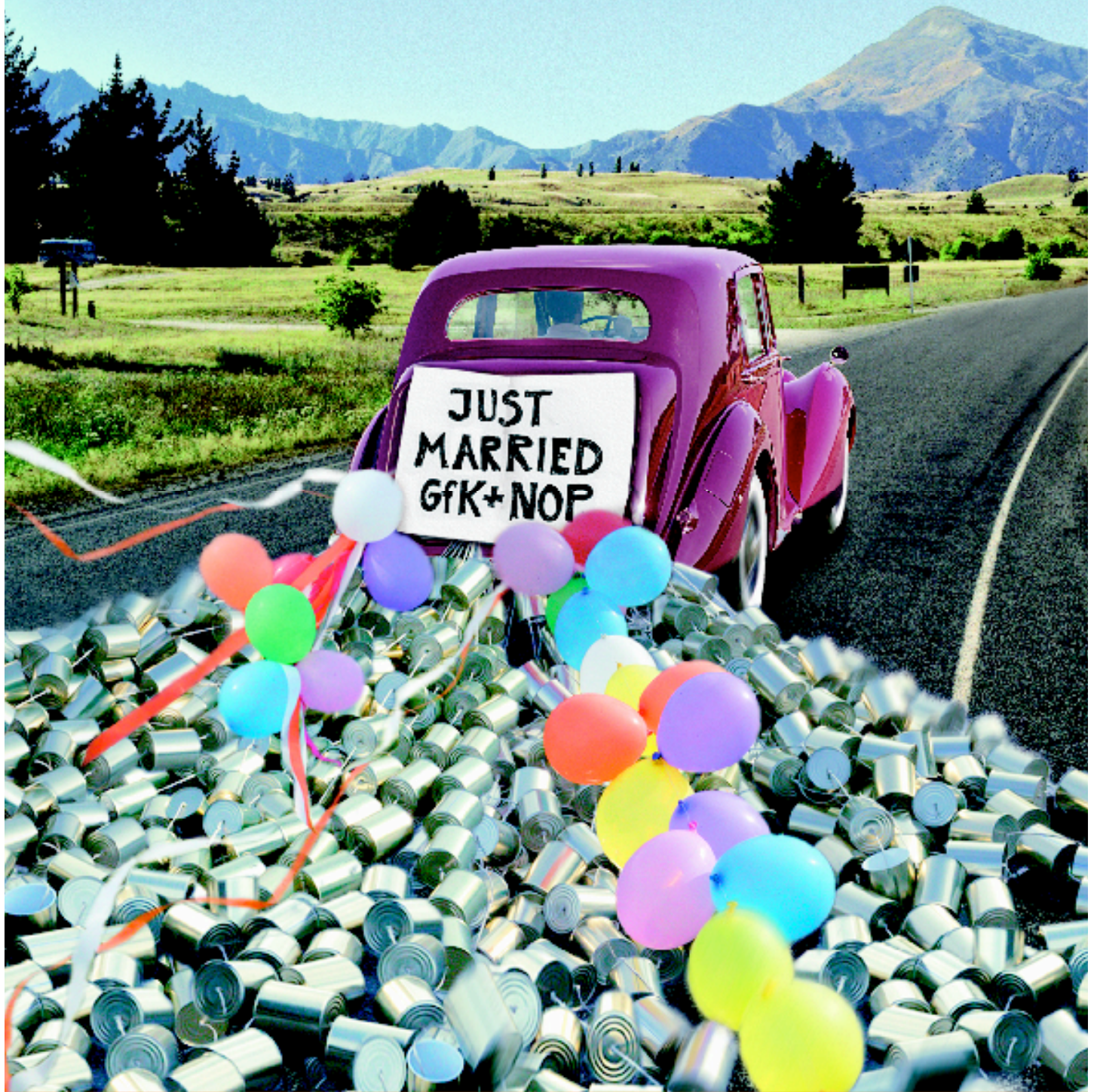
*Editor's note: Janet Savoie is senior director, client development, at Online Survey Solution, a Nashville operating unit of M/A/R/C Research, Irving, Texas. She can be reached at 615-383-2502 or at [janet.savoie@onlinesurveysolution.com](mailto:janet.savoie@onlinesurveysolution.com).*





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panelists differently. The number can represent households or individuals. Panels counting households assume they have access to everyone living in that household for surveys through the individual who actually signs up for the panel. For instance if they have one million households they would assume perhaps 2.5 million potential respondents. Panels that count individuals may have more than one person in a household on their panel but they do not track that.

The size of the panel is especially important if you plan to do large tracking studies that require unique respondents for every wave or if you are looking for low-incidence groups. If you are doing research overseas, what is the panel's international reach? If they do not have their own panel do they have reliable global partners?

3. *What do you know about your panelists?*

The more information known

about respondents and their household members, the better it is for the health of the panel and for panel buyers. If consumer buying behavior, hobbies, occupation, etc., can be targeted, fewer e-mails have to be sent out - which cuts down on the number of invitations each panelist receives. It is good for researchers because it helps keep down the cost of low-incidence studies. Most panel companies can supply you with a list of their targets. Usually the list is long but they may have only screened a portion of the panel on each target (except for major demographics). What this means is that there may not be sufficient numbers to do the size study you need to do, especially for B2B. B2B is still difficult online but for some specific groups such as physicians, small-business owners and C-level executives, panel companies have invested in developing sub-panels. Find out what is available or if they offer a phone-to-Web option. Many panel companies regularly re-screen pan-

elists for specific information, so a good follow-up question (if you have a group you routinely survey) is to ask if there is a way to get a question or two on soft exits or on screening questionnaires.

4. *What steps do you take to make sure I have a representative group taking my survey?*

Most panel companies can claim that their panels stack up well against the Census, except for the elderly, the very low-income and the minority segments. But the base representation of the panel is not the key issue. What is important is the number and variability of the sources for the panelists and the process used for pulling a representative sample. One issue to be aware of is that when sample is pulled, the pull is usually based on three variables - age, gender, geography - and it is not pulled by race unless it is specifically requested by the client. There is nothing wrong with this, but from my experience, clients

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aren't always made aware of it, and they get frustrated when they get their data back they often have only 2-4 percent African-Americans and Hispanics. In the client's mind a representative sample is representative on all demographics, not just three. Find out how many and which variables they are using. Also make sure to verify that when they are pulling sample that they take into account the response rates of the different segments of their panel.

5. *How do I know if Jane Doe really filled out my survey?*

This is a hard question for panel companies to answer as there is no equivalent to phone validation in the online world. Some panels have

a system in place where they re-screen for demos that should not have changed, like gender and year of birth, and compare that data to what is in the respondent's record. If there is a discrepancy they can delete the survey. This process needs to be combined with password protection so that Jane Doe cannot take the survey multiple times as different people and then send it to John Smith so he can take it. Passwords insure the survey assigned to Jane can only be taken once.

6. *Do you limit the number of surveys respondents can receive?*

Everyone is worried about professional respondents, and most panels claim to have a strict policy of sur-

vey management. Some companies limit the invitations sent to a respondent over a certain period of time; others rest panelists when they have taken a certain number of surveys. Find out what the policy is and then join the panel using a personal e-mail address. That is the best way to determine their commitment to their policy. In their defense, panel companies are finding it more and more difficult to control survey volume to their panelists because the demand for online research has dramatically increased over the last few years. The demand has grown faster than the panels have grown. Ask what their plan is to balance supply and demand for sample with their panel management policy.

7. *What information will you need to give me pricing?*

Although incidence, length in minutes and number of completes is what is minimally necessary, companies will usually require complexity level and programming length as well as respondent length and specific quotas. The more information you are asked for the more likely the price will be accurate. If you are asked all the right questions up front, there is lower likelihood of price issues down the road. Of course if your specs change before or during fielding, the price will also likely change. In general, incidence is the responsibility of the client, not the vendor. Most companies are willing to give



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pricing for several incidence levels if the client is unsure.

8. *Will your programming platform meet my needs for complexity and timing?*

The ability to program specific types of questions (discrete choice), to handle complex quotas and to offer cool tools (card sorting) is an important area to explore. Ask if they have a survey demo. You can get a good feel for their capabilities and a good look at how they present the questions to the respondent. This is also a good time to inquire about the experience level of the programmers on staff and where they are located. Are they in-house or overseas? Will you have access to them? Will they be on the kick-off call? And, since timing is often an issue, what is the typical turnaround time and can you accelerate a schedule if necessary?

9. *Who will be managing my project?*

Once a project hits the field, the day-to-day contact is with the pro-

ject manager. If you are looking for a company to partner with, you probably want to develop a relationship with one or two project managers who will be a constant on all your jobs. First find out the experience level on the team in research and in managing research projects. If you do very complex work, ask if you can be matched with a project manager who can handle that level of complexity. This is a key relationship: You want someone who understands your requirements and can anticipate your needs. If you work well with a particular project manager, can they be assigned to all your projects? Will there be a back-up person assigned?

10. *How do you price your services?*

Does it always come down to price? Clients say no, but they want to understand how things will be priced and if it is a firm price. Are the charges per hour, per complete, per amount of sample used? Can costs be broken out so they can

compare between vendors? Are there hidden costs? One universal complaint is being nickel-and-dimed to death. Clients expect price changes if the length and incidence change dramatically, but they don't like surprises that knock their budgets out of the water.

**The right fit**

Asking the questions that reflect what is important to you is crucial when you are interviewing a potential online vendor. Does the company have the resources to do the job the way you need it done? Just like shopping for the right running shoe, you need to make your choice based on the right fit for your needs. But in either situation, the proof is ultimately in the pudding. Whether you are out on the road for the first time or partnering on that first project, what matters most is if promises are kept and it feels good. Hopefully, asking these questions will help you narrow the field down to those who are potentially the best options. | Q

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# New problems, new solutions

**M**ystery shopping, as initially used by many industries, was crude, unsophisticated, lacked reliability, and in most cases was statistically unsound. The early programs had, as their goal, to evaluate retail conditions – that is, how products were moving, whether one product line was recommended over others, or how prominently a product was displayed and where.

These early mystery shopping programs were deemed “observational” because the program objective was to have the shopper observe and record what he or she saw. This approach has advantages but some drawbacks as well. By making observations only, it is difficult to evaluate the interaction of retail employees and customers.

Mystery shopping became much more useful as a self-assessment tool when mystery shoppers – or testers posing as customers or potential customers – based their evaluations not only on observations but also upon actual retail transactions – for example, purchasing a product from a sales clerk at a department store, opening an account at a bank, buying gas, applying for a loan or cashing a check at a teller station.

## Mystery shopping comes of age

Mystery shopping was initially thought of as a very subjective and primarily a qualitative research technique. Today by increasing sample sizes (number of shops), standardizing the scenario or persona of the shopper, thoroughly training the shoppers, adding an objective questioning format and providing reports quickly in an easy-to-access format, the findings have become more reliable and actionable.

Therefore, companies are relying on mystery shopping more and more.

Most companies got their feet wet in mystery shopping programs by conducting the programs annually or at least every two years. They served as benchmarks or baselines

and as follow-up programs to evaluate change. Now management realizes that mystery shopping done infrequently does not serve a motivational purpose to help employees improve how they treat customers; used that way, it is nothing more than a monitoring tool. If a company uses shoppers on an ongoing basis, store and branch managers and employees, aware that mystery shoppers might visit, are more careful about how they treat customers and how they display and sell goods.

By having mystery shoppers visit or call branches or stores quarterly,



By Paul C. Lubin

Mystery shopping adapts to serve a range of needs

*Editor's note: Paul C. Lubin is senior vice president of Informa Research Services, Calabasas, Calif. He can be reached at 212-889-5941 or at [plubin@informars.com](mailto:plubin@informars.com).*



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monthly, and even weekly, the mystery shopping technique is capable not only of evaluating sales and service quality but also of serving as a motivational tool to help improve sales and service and thereby increase customer loyalty. More than 25 years of industry experience with mystery shopping has demonstrated that as sales professionalism and customer service improve so does customer satisfaction and customer loyalty.

Retailers have come to recognize the importance of developing and maintaining a sales culture, as well as continually striving for improved service and customer satisfaction. As a result, ongoing mystery shopping has become a popular research and self-assessment technique.

Traditionally, mystery shopping has been used to evaluate, monitor and improve sales skills, service standards, operating procedures, the branch or store environment, traffic, staffing efficiencies, transaction processing and training programs. Now the research technique is

being applied to address business risk and legal or compliance issues. In fact, the technique is extremely well-suited for this because it profiles the sales and service process and can tell whether customers are being treated fairly and honestly and whether the applicable legal and regulatory requirements are being followed. Even government enforcement agencies and local community groups are using the technique to test for discrimination in the real estate and mortgage business.

By implementing a well-designed mystery shop program a company can limit the risk associated with inconsistent sales and service across its branch and store network and therefore help to maximize revenues per dollar spent on brick-and-mortar locations, telephone centers and retail employee wages. In addition, a mystery shop program can help a company defend itself against allegations of unfair or misleading sales practices and discrimination. These

allegations can have a substantial impact on company reputation and sales and can result in significant legal costs and ultimately settlements or civil penalties.

One of the first steps in building a sales and service culture that treats customers fairly is to determine the customers' requirements and the specific cues and sales and service behaviors and processes that show customers that their needs are being met. The next step is to incorporate those behaviors and processes into the company's sales culture by creating guidelines and procedures for handling customer inquiries and transactions. The company should then continually monitor the performance of employees and its sales and service process and let the employees know how well they are adhering to the sales and service guidelines.

### Implementing mystery shopping

A carefully structured plan is needed to implement a successful mystery shopping program.

1. *Determine a clear objective.* It might be to measure and motivate adherence to your sales and service guidelines. Or you may want to diagnostically assess your sales and service practices versus the competition. Then again it might be to check on compliance with regulatory guidelines and the law.

2. *Select the right form of mystery shopping.* Ongoing or tracking programs - monthly, bimonthly or quarterly - will help you continually measure and motivate employees. They also help to spot and remedy issues quickly. Diagnostic mystery shopping programs profile the sales and service process and uncover your strengths and weaknesses. These programs are usually conducted once or twice a year and help identify specific areas where sales and service can be improved.

3. *Determine the sales or delivery channels to mystery shop.* To day companies market and service customers through a variety of channels: stores, telephone, the Web and mail.


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Mystery shopping each of these channels helps the company maximize its sales and service.

4. *Simulate an actual customer experience.* It's best to do this by recruiting professional mystery shoppers who closely match the profile of your customer base. The shoppers should be objective, unbiased and smart. This will help limit shopper detection and provide for easy acceptance by management.

While some companies use their own customers to mystery shop, this approach can be misleading. Because customers evaluate the employee and company while conducting their own transactions, the approach of using customers does not provide the precision needed to detect inconsistencies in how the company responds to certain scenarios or situations. Hence the information provided is not as actionable in remedying employee non-adherence to company policy and guidelines on how to serve customers.

5. *Train the shoppers thoroughly.* The training should cover the program's objectives, unless it is for legal or regulatory compliance. If that is its purpose, check with your legal counsel before informing the shoppers about the true objectives of the program. Review the scripts and conduct role-plays to ensure the shoppers are comfortable with the scenarios. And cover the questionnaires and your sales and service guidelines with the shoppers.

To help ensure a credible program, recruit professional mystery shoppers who have the ability to complete the mystery shops and who represent the demographic composition of the customer base. Most mystery shoppers today are females working part-time. Females may or may not be treated the same as males. The same is true for whites, African-Americans and Hispanics, etc.

6. *Inform your employees about the shopping program (but do not tell them when or where the shops will occur).* This will help build support for the program and will clearly communicate to employees the importance man-


agement places on employee adherence to its sales and service guidelines and policies.

7. *Develop a questionnaire that is easy to understand and complete.* A complicated questionnaire hinders a shopper's ability to accurately record the experience encountered when meeting or interacting with the employee. Make sure the shoppers take with them the questionnaire they will need to complete when traveling to

(or preparing to phone call or log into a Web site) the company they will shop. Be sure that the shoppers complete the questionnaire immediately after completing their assignments. This will ensure that the shoppers are accurately recording the sales and service performance of your employees.

8. *The shopper questionnaire should be sight- and computer-edited.* Review the questionnaires completed by the

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shoppers before providing feedback to your employees. Using an Internet-based reporting mechanism helps prevent the shoppers from entering inconsistent answers. It does not however prevent shoppers from entering verbatim comments that do not match their yes/no comments describing what was experienced. Careful training helps to control this. Still you will need to review the verbatim comments offered by the mystery shoppers. If there are inconsistencies you will have to speak to the shopper to resolve the issue.

9. *The reports should clearly identify your strengths and weaknesses.* The reporting program should provide the flexibility to provide feedback to your stores, branches and employees.

10. *The reports should be provided as quickly as possible to the employees shopped.* This increases the actionability of the information since managers can more rapidly address and remedy problems. Consider having the shoppers transfer the answers

they recorded on the paper questionnaire to an Internet questionnaire.

11. *Consider developing a numeric scoring system that objective ly measures employ ee performance.* This will help you easily identify the degree of adherence or non-adherence to your sales and service guidelines and policies.

12. *If the purpose of the shopping program is to motivate and recognize performance, include the results in an incentive program.* The mystery shop score should be used with other performance measures – retention, sales growth, profits and new accounts – to help motivate and reward employee performance.

13. *Coach your employees based on the results.* The branch manager or training department should use the mystery shop results to help coach the employees on how to improve. By describing the results of the mystery shopping to employees on an ongoing basis employees you consistently remind employees that the company is measuring adherence to its sales and service standards and policies.

### The benefits of mystery shopping

The turn of the century has brought with it diverse markets and new markets (African-Americans, Hispanics, Asians, females, seniors and so forth), new technologies and almost instantaneous information. Consumers are information-hungry and making new demands. They learn and react quickly, especially when they are not treated well or feel they have been misled or, even worse, discriminated against. This heightens the importance of ensuring that customers are treated fairly and consistently and that their needs are met.

Company shareholders, Wall Street, consumer advocates, the media, federal and state and local regulators and community groups are all more involved than ever before. Wall Street and company stakeholders want to make sure that your firm is maximizing its rev-

enues and minimizing expenses. Consumer advocates, community groups and law enforcement want to make sure consumers are not misled – and that they are treated fairly and have equal access to goods and services.

Mystery shopping will pinpoint your strengths and weaknesses for training and policy refinements and help you take maximum advantage of sales and service opportunities. More importantly, you can assess the sales and service process; evaluate employee product knowledge, determine the discovery skills of your employees; and learn how your employees treat customers.

Mystery shopping can help your company increase market share and profits while ensuring that your sales and service practices are fair and equal. Unlike customer satisfaction research conducted via the telephone, mail or Internet – which only measures what customers remember and perceptions of the service received – mystery shopping captures information at a moment when the employee is serving the customer or potential customer. Thus it can be used to measure and improve the sales and service experience encountered by current and potential customers. It profiles the customer-employee interaction and tells you whether it is consistent and of a nature that adheres to your standards, while maximizing customer satisfaction and sales.

### New challenges

Companies face many new challenges today. Mystery shopping can play a prominent role in your sales and service strategy. It will help ensure optimal performance across multiple delivery channels while maintaining reasonable management oversight of sales practices for compliance and legal reasons. And mystery shopping will help you reinforce the importance of sales and service to the frontline staff. Ultimately this will help improve sales and shareholder value by controlling attrition and improving customer loyalty. | Q

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# Beyond customer service

In an age in which consumer markets are becoming increasingly powerful, continually assessing how well your company is fulfilling consumer expectations of your brand is no longer a luxury relegated to the realm of big corporations. It's a necessity that can ensure success for even the smallest of retail operations. And failing to implement this kind of evaluation can mean an untimely death to your business.

While it's easy to believe this type of assessment can be conducted under the umbrella of an in-house marketing or quality-assurance department, the truth is such perspectives often are skewed according to a number of factors, including personal bias, demographic alignment with your brand or product, and the simple fact that employees are not customers and therefore do not share the same perspective. Likewise, customer surveys of any type (online, mail, in-store), while an often revealing and helpful practice, tend to deliver subjective results based on an individual's general interpretation of his or her experience as "good" or "bad."

So just how do you obtain an accurate assessment of how well you're delivering on your brand's promise? And how do you evaluate the less tangible elements of your brand standards - the ones that are hard to quantify numerically but are so vital to the overall look and feel you have designed?

Enter the mystery shopper. Sometimes stereotyped as a subjective and slightly campy approach to evaluating employees' delivery of customer service (think trench coats, wigs and dark sunglasses), mystery shoppers actually embody the balance between employee and customer and, if used correctly, mystery shopper programs can provide an insightful and accurate means of measuring both tangible and intangible elements of your brand. Furthermore, the highly structured, specific feedback you receive from such a program can prove to be a valuable

management tool, serving to continually build your brand, inform and reinforce training, communications and sales strategies, motivate staff, increase your competitive intelligence and, ultimately, ensure absolute consistency in every area of your operations.

In other words, if you're not using a mystery shopper program - or

How mystery shopping programs can boost your brand and your bottom line



By David Rich

*Editor's note: David Rich is president of the Mystery Shopping Providers Association and president of ICC/Decision Services, a Wayne, N.J., mystery shopping firm. He can be reached at [drich@iccds.com](mailto:drich@iccds.com).*



you're not using the one you've got to its full advantage - you could be overlooking a powerful competitive weapon.

### Build your brand

Think about your last restaurant meal. Chances are you remember what you ate, who you were with and whether or not your server was pleasant. And if your service was slow or less than satisfactory, you probably remember that too. (In fact, you're more likely to remember bad service than good.) But do you remember how long it took for the host or hostess to seat you, or how many minutes it took for bread or water to arrive at your table? For that matter, how long did it take for your server to greet you? If you ordered hot food, was your plate also warm? Were serving sizes consistent with the restaurant's standards? Were your beverages refilled at appropriate intervals? Did your server check on you the requisite number of times? Just how did you decide whether

your experience was good or bad? And just what elements constitute one or the other?

If you're a typical consumer, you probably can't answer very many of these questions, nor should you have to. After all, you're there to enjoy the overall dining experience not to dissect it. It goes without saying, then, that your assessment of that experience will be based primarily on two general factors: past experience with the brand and expectations developed as a result of those experiences. And if your experience met or exceeded these potentially arbitrary expectations, you'd probably rate it as "good" regardless of whether or not specific standards were actually fulfilled.

Now think about the difference between a typical customer's assessment and that of a mystery shopper. Unlike a typical customer, a trained mystery shopper will have in hand a detailed list of expectations based specifically on the standards and goals

of that particular brand. And where a normal consumer might not notice the particular details of the experience, such as the time it takes to receive seating or obtain service, whether background music is switched on and playing at the correct volume or whether the size of a meal portion is correct, a mystery shopper will note these things and more in detail, painting an accurate and thorough picture of just how well your operation is performing when you aren't there.

After all, consumers come back when they know they can count on receiving the same quality, service and product every time - no matter where they are. It's as simple as that. And the companies that master this concept are the companies most likely to top sales within their niche.

Take Starbucks, for example. No matter which city or store they're in, customers know precisely what to expect - not simply in terms of service, but in terms of overall experience. Each store's product, design, atmosphere, décor and service is so predictable that it becomes intuitive; as a result, consumer behavior and response can also be accurately predicted - making it even easier to design promotions, incentives and products that will immediately boost sales.

How do Starbucks and other similarly successful businesses achieve this kind of consistency - and enjoy greater returns as a result? By identifying and statistically quantifying every conceivable element of the overall consumer experience - and then continually analyzing just how consistently those elements are delivered.

### Continual assessment

What's the difference between a store that offers customers an in-store charge card at checkout every time and one that makes the same offer just 20 percent of the time? An annual sales increase of \$90,000 per store, according to the experience of one

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How did they make such a discovery? By using a mystery shopper program to provide continual assessment of their operations. And when analysis revealed that the majority of employees weren't offering a charge card at the point of sale (something they were trained to do), the mystery shopper reports provided valuable statistics on the frequency of such offers. They also served as a valuable benchmark for improving this particular aspect of in-store service - yielding such a substantial ROI in the process that the mystery shopper program didn't just become self-funding, it became an integral part of the retailer's training and growth strategy.

In this instance - as in so many others - mystery shoppers combined the interests and objectives of the retailer with the eyes and perspective of the target consumer, accumulating statistically quantifiable data about sales performance and potential in the process - data that could then be used to rein-

force expectations and training strategies at all levels.

### Improve performance

Clarifying employee expectations and creating reward and incentive schemes go hand in hand with increasing sales - and mystery shopper programs are a perfect vehicle for combining these objectives.

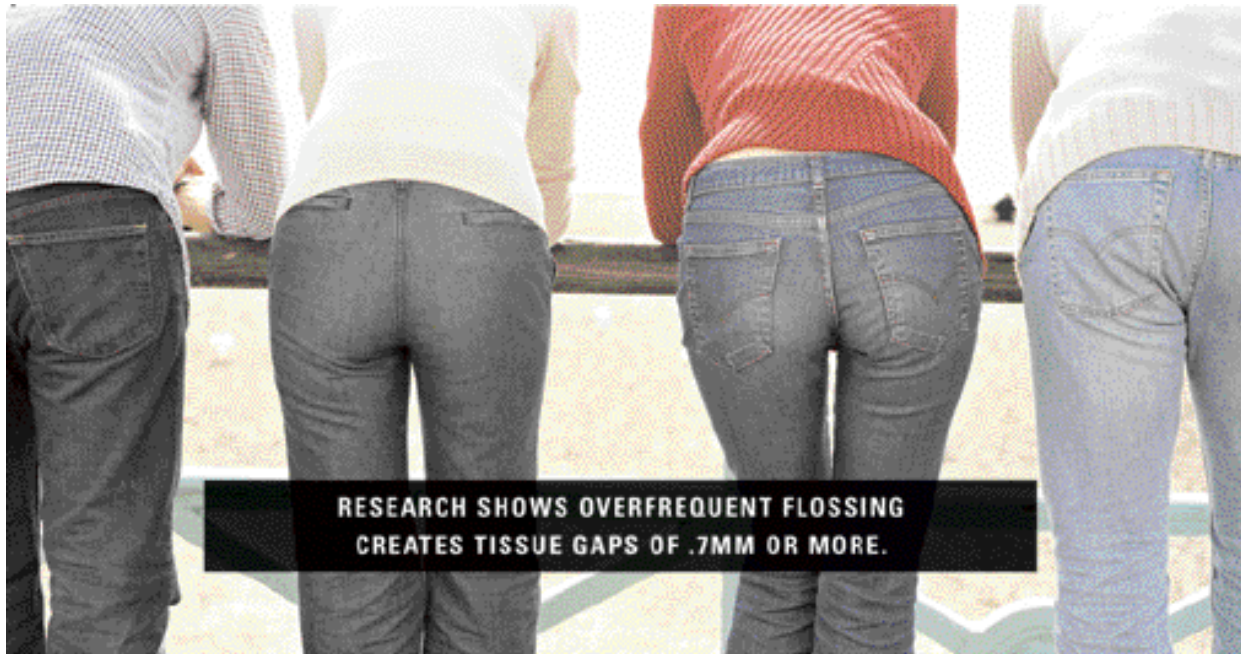
The question of whether or not to inform employees of a mystery shopper program is up for debate, but informing employees of such a program (one common practice is to do this after the first mystery shop has been completed) yields all kinds of opportunities to reinforce training and standards. Mystery shopper programs can also provide management staff with a means of clarifying expectations in such a way that employees are not judged in subjective terms (like good, bad or average) but instead are assessed in terms of whether employees individually or collectively fulfilled

particular standards for service and performance.

Likewise, the same data can be tied to incentive and reward programs as a means of fostering a culture based on sales and quantifiable performance (for instance either you built the display or you didn't; you greeted an incoming customer or you didn't). After all, in the words of Tom Peters, "What gets measured gets done." And if an employee has a clear list of the standards they're expected to meet - and they know they're being measured against them - the likelihood of those standards being consistently fulfilled increases dramatically. And so does your bottom line.

### Competitive audits

Further proof that the scope and advantage of mystery shopper programs extends well beyond that of a perfunctory customer service evaluation is their effectiveness as a tool for conducting competitive audits - and for building a body of competitive



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Less well-publicized than most aspects of a mystery shopper program, competitive audits (sending mystery shoppers to assess various aspects of a competing brand or store) provide an opportunity for you to observe, test and analyze the operations and performance of those competing for your market share. In this case, mystery shoppers offer you a consumer-based perspective through the mind of a trained market researcher.

As with using a mystery shopper within your own operations, the resulting data can be used as a benchmark against your own brand experience. It can also reveal areas of quality, service or performance that fall short in comparison, providing yet more quantifiable data from which to generate additional training or redesign existing employee education.

### Identify patterns and trends

Delineating strengths and weaknesses in contrast with your competition is just the tip of the iceberg when it comes to the change potential offered by a mystery shopper program. Obviously, a my assessment of employee performance will also identify possible problems, concerns or oversights in a variety of important arenas, including ensuring the fair and equal treatment of customers regardless of race, gender or appearance, and the competent handling of product quality issues, questions and complaints.

Beyond this list, however, mystery shopper programs are a valuable means of creating – and maintaining – an on-site record of failures and achievements such that patterns and trends can be quickly and easily identified and changes can be implemented as necessary. These trends run the gamut from very basic to more complicated issues

like employee–customer interaction, manager–employee interaction, the frequency of upselling (remember the in-store charge account case?) or the regularity with which menus, signage or displays are refreshed or updated.

And while nobody wants to entertain the prospect of a lawsuit, simply ensuring that a store is free from obstacles, the lights are on in the parking lot, and sanitary conditions are maintained in store restrooms can pay dividends in averting litigious action – not to mention unwanted publicity. Similarly, mystery shoppers are also an effective tool for reducing product theft and measuring the effectiveness of in-store security systems.

### Support and quantify

Clearly, the influence of a mystery shopper program can extend into almost every facet of your business, offering a sound analysis of best practices and reliable data on which you can continually build and expand your brand. Mystery shopper programs are both an invaluable source of insight into the effectiveness of your current operations and into the potential for future changes and improvements. They can also be used as a means of testing those changes as well as evaluating the practices of your competition.

Strategically, the information collected through the consistent use of a mystery shopper program can shed light on vitally important weaknesses, strengths, patterns and trends across all strata of your operations, providing data to support and quantify decisions that may otherwise be based on intangible evidence.

In other words, consistent implementation of a mystery shopper program within a sales- and service-oriented culture can translate into revenue growth substantial enough that such a program will, ultimately, pay for itself in dividends. | Q



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# Shopping for shoppers

A recent posting in a chat room for mystery shoppers states, “I just took the test at a company site and failed it. Why does this company want me to do this test? I thought mystery shopping was just that, not how smart you are! I think this site might be a little picky about who they hire.”

Given the erroneous, spam-fueled claims of easy money and free products garnered from mystery shopping, the floodgates have opened up, and anyone with a computer wanting to make a little money on the side thinks they are the perfect candidate for mystery shopping. After all, we all shop, so therefore we all qualify to be mystery shoppers, right? Absolutely not! Mystery shopping companies have a right to be picky about their shoppers. The shopper reports are the product they are selling, and if the product doesn't live up to expectations, clients will certainly go elsewhere.

There is much more to mystery shopping than just enjoying the shopping process. Attention to detail, excellent grammar skills, objectivity, reliability and the ability to express oneself clearly and succinctly are absolutely critical.

## Recruiting only the best independent contractors

The Web has made shopper recruitment very easy and cost-effective, benefiting the industry as a whole. However, it has also opened the door for scammers and illegitimate companies. How do you differentiate your company from others and get the best shoppers to register with you?

First, if you haven't already joined the Mystery Shopping Providers Association (MSPA), consider applying for membership. The association is the largest in the world dedicated to mystery shopping. The MSPA Web site, [www.mysteryshop.org](http://www.mysteryshop.org), allows visitors to search for companies by location or specialty. Being

listed on the site gives your company credibility, and shoppers who do their homework will sooner or later end up at the MSPA site.

Next, use the Web to your advantage. Register your site with the big three search engines, establishing keyword phrases that prospective shoppers will likely search, such as “mystery shopping company” and “secret shopper.” Make sure your Web site is user-friendly for prospective shoppers. A good way to find out whether your site is truly easy to navigate

Surefire ways to cultivate the brightest mystery shoppers



By David McAleese

*Editor's note: David McAleese is co-founder and CEO of A Closer Look, a Norcross, Ga., mystery shopping firm. He can be reached at 888-446-5665.*



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is to solicit input from current and prospective shoppers.

Also, be sure to advertise for shoppers on message boards and within chat rooms. Three good ones to check out are [www.mysteryshop.org](http://www.mysteryshop.org), [www.volition.com](http://www.volition.com) and [www.mymommybizboards.com](http://www.mymommybizboards.com). By targeting these and similar sites, your likelihood of finding quality shoppers is much higher than Internet advertising on sites that aren't directly related to mystery shopping.

Last but not least, one of the most productive forms of recruitment is word-of-mouth. Great shoppers are like gazelles and tend to herd together. Identify your best shoppers and tap into them for referrals. This is an especially good tactic when you have to field a study quickly in a new area.

#### **Downplay demographic information**

Now that you have a pool of shopper candidates, it's important to weed out those who don't possess the skills needed to do a good job. There are

several ways firms currently qualify shoppers, but not all of them reap the very best candidates.

Many mystery shopping companies qualify shoppers based solely on demographic information, but what does that really tell you? If we know Sally Shopper is 5'4", married, holds a college degree and earns \$52,000 a year, does that mean she can objectively and thoroughly evaluate the client's business? It may give a scheduler insight into whether she fits a client's customer profile, but does she possess the skills needed to be a good shopper? Even having an Ivy League education doesn't necessarily make someone a great shopper.

In addition to possessing excellent grammar skills, the top shoppers are observant, organized, perceptive, focused and detail-oriented. In a casual-dining restaurant, for example, the timing of the food is extremely important to managers. For instance, they want to confirm that the salads arrived five minutes after the appetizers were cleared, that the main course

was delivered within seven minutes after the salads were removed and that desserts were served seven minutes after ordering. An astute shopper keeps track of the timing, while also evaluating the server's knowledge, appearance, efficiency and interpersonal skills.

In qualifying shoppers, it's best to consider a two-phased approach, introducing both quantitative and qualitative criteria. If you think about it, rarely do you hire anyone without a minimum of two interviews. Hiring a mystery shopper should be no different. They are representing your company, and their skills and fit should be as important to you as if you were hiring them to work in your office full-time.

Issuing a two-phased test doesn't have to be a drain on your existing staff. Begin with a quantitative section, which will help to weed out shoppers who don't possess the basic skills required for a mystery shopper. Include questions that test an applicant's grammar, spelling and sentence structure skills.

This quantitative section should be short, between 10 and 12 questions, and is well-suited for multiple choice and yes/no questions, which are easily graded.

To ensure credibility, experts suggest generating extra questions, so no two applicants get the same set of questions, or, if you allow an applicant to retake the test, they do not take an identical test. It's also a good idea to randomize the questions so there is variety both in the type of questions and in the order in which they appear.

It's relatively simple to put together a test for shoppers. One approach is to solicit questions from your staff; they have a vested interest in working with quality shoppers. Another approach is to tap the Web for sample tests. Use the search term "free spelling test" for instance.

#### **The argument for an aptitude test**

An argument can also be made for testing shopper aptitude by including a couple of analytical, sequencing or



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numerical questions. This aspect helps to measure an applicant's ability to follow instructions, while also testing their intellect.

There is a distinct benefit to incorporating these types of questions since shoppers are required to assess a client's strengths and weaknesses, says Stephanie Husk, president of Deep Blue Insight Group, Inc., an Atlanta research firm. "Analyzing a company's strengths and weaknesses requires critical thinking skills. It is important that a shopper's answers be objective and well thought out," she says.

In terms of scoring, apply the standard grading scale used in schools. People who score 90 percent and higher should automatically move on to the qualitative section of the test. Applicants scoring between 70-89 percent are on the bubble and their narrative should be closely evaluated. Those applicants scoring 69 or below should be thanked for their time and dismissed.

Some of the applicants you turn down may want to retake the test, so determine how many times a person can take the test, keeping track of their attempts via their e-mail address. Two attempts should be sufficient to determine if a shopper is right for your organization.

### Passionate people are preferred

The narrative is a very important part of a pre-qualification test. In addition to measuring writing skills, and the ability to express one's opinions, you should ask an applicant to submit his or her observations about a recent shopping, dining or customer service experience.

Naturally, you want to find people who are passionate about eating out, staying in hotels or shopping. They can be discriminating about the service and product. When your client reads comments about a shopper's experience, he or she is going to want more than "Yes, I think it was good."

Finding out whether a shopper is truly passionate can be determined by the way a shopper answers the

narrative question. Instead of asking, "Tell us about a recent restaurant experience," Husk suggests taking it one step further, asking a follow-up question such as: "What made it great?" or "What could they have done better?"

Reviewing these narratives obviously takes time. Consider paying an editor to review the applications, or perhaps even hire a college student majoring in English, giving them

specific guidelines on how to grade the potential shopper's submission. There are several elements that should be rated:

- grammar and spelling;
- sentence structure;
- ability to express oneself;
- attention to detail;
- ease and flow of writing.

These items can be weighted equally, or the most important ones can be weighted appropriately. For



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instance, if the ability to express oneself and attention to detail are most important, assign those sections a higher point value than the others.

### Segmenting your shoppers

Similar to how companies segment their audiences for marketing purposes, you should segment your shoppers based on their aptitude and performance. In order for a shopper to give an accurate assessment, he or she must be a frequent patron of shops, restaurants or services of the client's caliber.

The narrative often provides insight into which types of shops are suitable for the applicant, enabling you to appropriately assign your audits. An exception would be high-end or extremely detailed shop locations such as fine restaurants, expensive department stores or full-service day spas. In those cases, it's wise to let your best, most seasoned shoppers handle these assignments.

The initial testing process should be just that - the start of a shopper's file.

After each completed shop, consider assigning a grade, scoring the timeliness of the report, grammar and spelling, attention to detail and the ability to follow instructions. Keep a running average of each shopper's score, so when you are fielding shoppers for your clients, it's easy to identify the best shoppers, ensuring that the client will be pleased with the results.

### Corral certified shoppers

The Mystery Shopping Providers Association offers a certification program for shoppers, testing their knowledge of the industry. Shoppers must pay a fee and pass a test to become certified. Silver certification can be earned by passing an online test; however, gold certification requires that a shopper attend a full-day seminar before taking the test.

There is definitely a correlation between silver/gold certification and great shoppers. Those who are willing to invest time and money becoming certified take their assignments seriously.

Although a certified shopper should still be required to pass the test you institute, devise a way to identify the silver/gold shoppers, and tap into them frequently.

### Staging seminars

In some instances, it is beneficial to hold a shopper seminar for a client. This gives selected shoppers the opportunity to hear directly from the client what is most important to them.

Eddie Valente, director of operations for Atlanta-based Buckhead Life Restaurant Group, says that shopper seminars are beneficial. "Hosting seminars for shoppers gives us the opportunity to explain in-depth our philosophy and what we are looking for," he says. "During the seminars, we tell shoppers that we are not necessarily looking for food reviews. Rather, we want them to pay special attention to the technical aspects of the service."

To Valente's point, prior to each assignment, no matter how experienced a shopper is, it's important to educate him or her on the company's philosophy and overall objectives. In order to prepare shoppers adequately, require that they review the shop guidelines, making sure to post any special notes that are specific to the client or their locations.

### Best and brightest

Building a database of superior shoppers will ensure that you are providing every client with the best and brightest. They will consistently generate reports that are timely, objective, practical and relevant, helping management easily identify potential issues before they become problems while recognizing staff members for exemplary performance. As a result, clients will continue to see the value in the service you provide, and your client retention rate will increase, proving the maxim we mystery shopping companies frequently preach: "The cost of maintaining a customer's loyalty over time is much lower than the cost of gaining a new one." | Q

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# Improve the customer experience

Mystery shopping is one of many techniques used to develop an understanding of the customer experience. People who are either real customers or who fit the desired customer profile go through actual product or service encounters. Afterwards, these shoppers systematically record the incidence of specific events or employee behaviors and often make additional measurements or observations regarding the product/service experience as well.

Mystery shopping can provide a variety of benefits and insights, including:

- Enabling an organization to monitor compliance with product/service delivery standards and specifications.
- Enabling marketers to examine the gap between promises made through advertising/sales promotion and actual service delivery.
- Helping monitor the impact of training and performance improvement initiatives on compliance with or conformance to product/service delivery specifications.
- Identifying differences in the customer experience across different day parts, locations, product/service types and other potential sources of variation in product/service quality.

Mystery shopping also has some important limitations:

- Limited projectability - traditionally, while mystery shoppers are viewing product/service experiences from the customer's side of the table, shoppers may not be genuine customers. (Increasingly, due to the sophistication of client customer management systems and the scenarios that require testing, real customers need to be recruited to conduct the evaluations. Such an approach adds credibility to any client program and is increasingly essential within certain market sectors [e.g., financial services].)

The criteria used by mystery shoppers to monitor the quality of product/service encounters will only be useful in effective management of customer experiences to the degree that these criteria are based upon actual customer expectations, needs and requirements.

- Continuous efforts to keep criteria consistent with evolving customer needs and requirements must be undertaken.

## Methodological considerations in the design and execution of mystery shopping programs

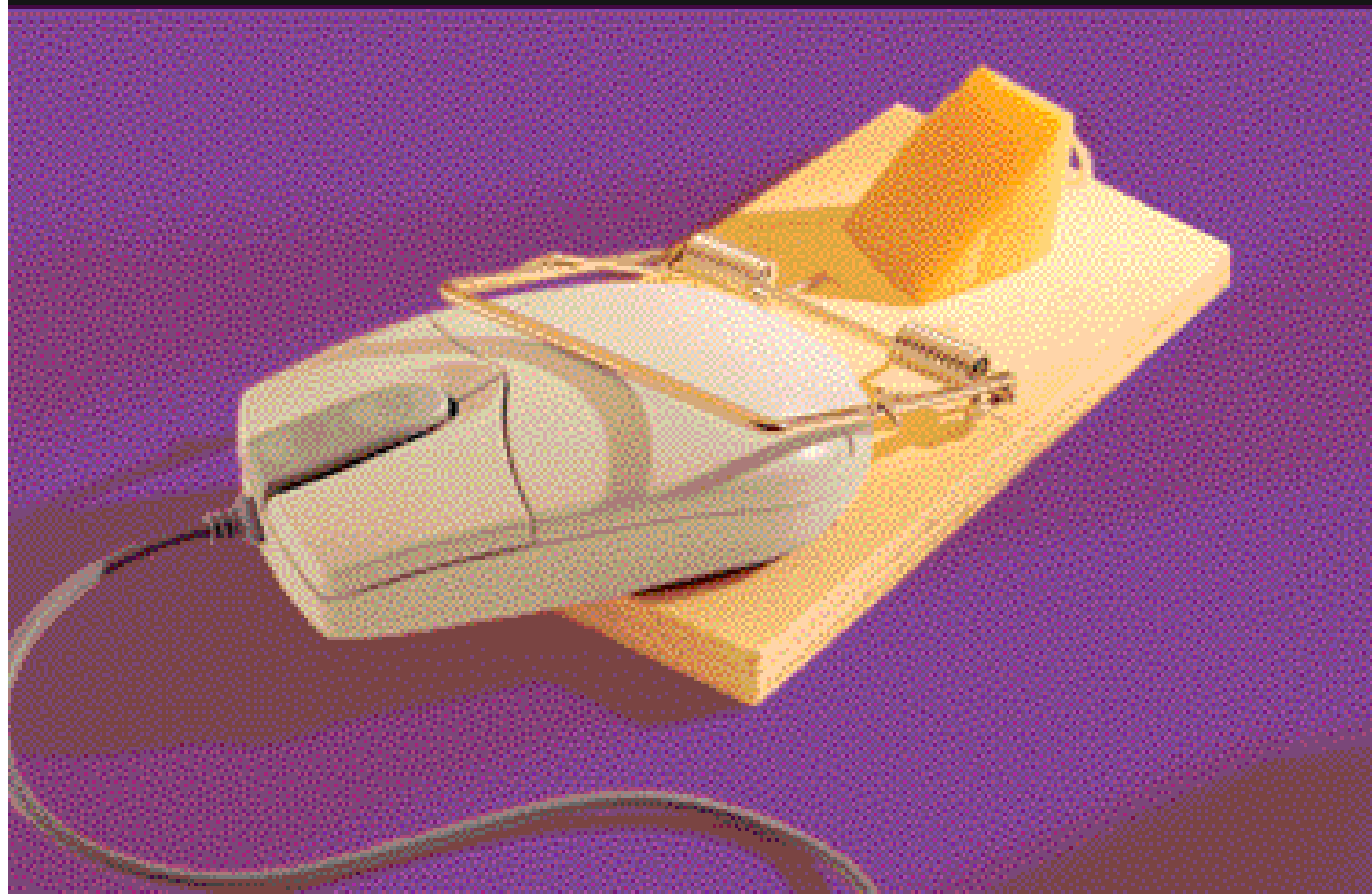


By D. Randall Brandt

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Understanding the strengths and weaknesses of alternative methods of capturing the voice of the customer – and how they impact an organization’s ability to address alternative managerial objectives and applications – is a key to building a comprehensive and effective customer experience management system. If mystery shopping is to be a part of that system, there are several methodological considerations that must be addressed. In particular, the following issues should be considered carefully in designing and executing a mystery shopping program:

1. *Selection of the attributes and evaluative criteria used by the mystery shopper.*

Ensure that the attributes/criteria used by mystery shoppers reflect things that are important to customers. What do customers want or expect from the product/service experience? What does the customer see, experience, scrutinize and evaluate? Answers to these questions let the organization act to actually improve customer satisfaction and loyalty.

The relative importance of the attributes also should be taken into account. This will ensure that any weighting scheme used to compute mystery shopping scores accurately reflects the differential impact of

each attribute, and gives the greatest weight to the attributes that are most influential in determining overall customer satisfaction and loyalty.

Measures and criteria used by mystery shoppers should be aligned with those used in surveys, comment cards and other methods of gauging the customer experience, so that convergence of findings obtained from these different data sources may be determined. In some instances, this means making an effort to match mystery shopping measures/criteria with those used in other methods. This makes it possible to determine if results of mystery shopping point to the same action items indicated by results obtained from surveys, inbound customer communications and other data sources. Such convergence, when established, tends to validate conclusions regarding priorities for effectively managing and improving customer experiences.

In some cases mystery shopping measures and criteria cannot or should not be matched to those used in other methods. However, an effort should at least be made to ensure that measures may be meaningfully linked based upon relevance or interdependence. For example, in industries such as banking, retail and hospitality, “waiting time” is an ele-

ment that commonly appears in both customer surveys and mystery shopping instruments. The key is to ensure that results obtained from each of these data sources may be linked. If a mystery shopper gauges actual wait time, while surveys ask customers to report how long they perceived to have waited in line, data analysis should focus on how customer perceptions vary with increases or decreases in actual wait time.

Alternatively, it can be equally insightful to also ask both mystery shoppers and real customers if their wait time was “satisfactory.” Such information makes it possible to calibrate shopper and customer perspectives and also enables the organization to set operational performance targets for wait time that are most likely to translate into positive customer experiences.

2. *Adequate sampling or coverage of events and/or sites via mystery shopping.*

As is the case with customer and market surveys, the quantity and frequency of observations directly impacts an organization’s ability to draw projectable conclusions from mystery shopping results. Results are more likely to be representative if a bank branch or customer service center is shopped on multiple occasions within a relatively tight time frame than if that branch/center is shopped once within a relatively wide and arbitrary time frame. This is another way of saying that the results of mystery shopping are subject to the effects of both sampling and non-sampling error. Therefore, take steps to ensure adequate sampling or coverage of the events, channels, and/or sites about which conclusions will be drawn based on mystery shopping.

Some specific steps to minimize sampling error and/or bias in mystery shopping results include:

- Carefully defining the entity or entities for which statistically accurate conclusions must be formulated and developing sample size requirements at the entity level. This becomes especially critical when results are going to be used in a

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manner that demands a high degree of statistical precision (e.g., if store managers' compensation is to be based at least partially on results of mystery shopping).

- Using results of mystery shopping as one of several performance indicators regarding the customer experience. When results of mystery shopping, customer surveys and customer comment cards all point to the same areas for improvement, managers are less likely to question the accuracy or validity of any single data source/method.

- Matching the timing, location and/or frequency of mystery shopping to actual customer behaviors, channel usage and related patterns. To illustrate, in the case of quick-service restaurants, if 60 percent of business is conducted at the drive-through window while 40 percent comes from walk-in customers, allocate the total number of mystery shops to be conducted in a manner that mirrors these proportions.

Execution of the preceding steps probably won't eliminate sampling error and/or bias altogether, but it will go a long way toward minimizing the impact of such error/bias.

### 3. Reliability and consistency of the mystery shopping criteria and procedures.

The mystery shopping method must be reliable. This means: (a) providing shoppers with clear and explicit guidelines for using mystery shopping criteria; (b) ensuring that mystery shopping criteria and procedures are applied consistently by each shopper from one site/event to the next; and (c) ensuring that the criteria and procedures are used similarly by different shoppers.

There are well-established methods for determining the reliability of mystery shopping procedures, and these should be applied in a pilot test of the shopping method before its full-scale implementation. For example, suppose that shoppers are asked to observe whether a store has floors that are "clean and free of debris." This item should be supported by clear definitions and descriptions (including photos or illustrations, if

available), along with guidelines that explain any allowances and thresholds. Similar support should be provided for all measures and criteria to ensure that shoppers are as objective and consistent as possible across sites and events.

It is also critical to establish consistency among shoppers. This is achieved by having multiple shoppers evaluate a common set of events or transactions to establish correla-

tions and levels of agreement. For example, in the case of a call center, multiple shoppers should listen to and evaluate a common set of recorded calls. Results may then be compared and, if necessary, efforts undertaken to maximize consistency and agreement among shoppers. This process, sometimes referred to as calibration, is another way to ensure the reliability and consistency of mystery shopping procedures.



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All of the steps above promote consistency and objectivity in mystery shopping procedures. A cautionary note, however, is in order: Emphasizing evaluative criteria and/or aspects of product/service delivery that are readily defined – or that reflect the organization’s priorities – facilitates objectivity and consistency. However, too much emphasis on these elements may preclude shoppers from recording unique or incidental things that might furnish important insights and opportunities for product/service improvement. Therefore, it is critical to leave room in the shoppers’ experiential checklist for these additional elements and insights. The result will be a mystery shopping approach that is disciplined and reliable but also opportunistic.

*4. Keeping shoppers and customers connected.*

Mystery shopping enables an organization to evaluate the degree to which product/service delivery complies with performance targets, stan-

dards, specifications, policies and desired behaviors that are intended to ensure a positive customer experience. Presumably, such targets, standards, specifications and policies are established on the basis of a clear understanding of customer needs, expectations and requirements. However these are moving targets that continually change and evolve. Therefore, it is critical to check periodically the alignment of performance standards, etc., with changing customer expectations, and to make adjustments in mystery shopping criteria and procedures accordingly. This will increase the odds that shoppers and customers stay connected.

**Comprehensive and panoramic**

There is no perfect method of learning all that is needed to manage customer experiences effectively. Thus, it is critical to employ and integrate multiple methods of measurement and observation to develop a comprehensive and panoramic

perspective.

While it does not always capture the voice of the customer directly, mystery shopping can be designed and implemented in ways that make it a very good method of customer-driven quality assurance. Generally speaking, mystery shopping is most useful for gaining insights that enable an organization to address two key questions about the customer experience:

- Do we actually deliver products and services in ways that are consistent with our performance goals, standards, specifications and/or policies?
- Do we actually deliver products and services in ways that are consistent with promises and claims made in advertisements, promotions and other customer and market communications?

By addressing the methodological considerations discussed above, an organization can go a long way toward ensuring that mystery shopping fulfills this purpose. | Q

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# Ensuring objectivity in packaging research

Product packaging has taken on increased importance for two primary reasons: increased necessity for shelf impact and a revitalized focus on the consumer experience. These reasons speak to two separate but equally important moments of truth for consumers. The first is the point of purchase (getting the consumer to place the item in a shopping cart) and the second is how the product's packaging performs (ease of opening, dispensing, storing, etc.,) which will impact re-purchase rates.

Given these trends, it is not surprising that many packaging design firms are turning to marketing research to help identify unmet consumer needs and translate those needs into consumer-driven packaging innovations. In addition to aiding the design process, design firms are realizing that consumer insight work can be a profit center for their businesses, as consumer research can often be sold with high profit margins. As such, manufacturers must be careful with how much they let their design partners drive the research process. As with any creative agency, packaging designers cannot help but feel ownership toward their creations and this natural inclination can, consciously or unconsciously, introduce bias into research design and analysis.

This is not to say that design firms should not conduct their own research. On the contrary, direct interaction with consumers serves to put the design team in the shoes of the consumer and stimulate creative thinking. The question, then, isn't "Should design firms conduct their own research?" but rather "What types of research are appropriate for a design firm to conduct?"

Appropriate types of research for a design firm to conduct include:

- a secondary research review of category data;
- an audit of research supplied by the client on packaging innovation;
- exploratory qualitative research designed to uncover consumer frustrations and/or unmet needs with current packaging and spark ideas as to how those frustrations/unmet needs

can be addressed through packaging innovation.

For the latter type of research (where the client's money is being spent), it is imperative that the research team meets with consumers in environments where key decisions are made (the retail outlet) as well as where product usage actually occurs (in the home, on the go, etc.). The reasons for this are simple. The actual retail environment provides stimulus (both category and non-category) for speaking with consumers about shelf impact (or lack

Let the designers design and the researchers research



By Michael Carlon

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thereof). In addition, interviewing consumers in environments where they naturally interact with product packaging helps to identify behaviors that are not typically revealed in a traditional focus group setting.

Some of these compensatory behaviors include sticking a knife into a clogged ketchup bottle, storing shampoo and conditioner bottles upside down in the shower, and using any number of sharp instruments to open a

new DVD or CD. Many times, consumers may not recall these behaviors or the obstacles they are intended to overcome in a traditional qualitative environment, as over time they become subconscious. However, it is imperative that the design team be aware of these behaviors and obstacles, as helping consumers overcome them is often the key to designing relevant and breakthrough packaging innovation.

### Be skeptical

If conducting secondary research, reviewing past research supplied by the client, and exploring unmet consumer needs in the form of exploratory qualitative research are acceptable tasks for a design firm to undertake, manufacturers should be skeptical of any design firm placing a strong emphasis on conducting the research that serves to evaluate packaging alternatives drafted by the design firm against the existing package. These include further rounds of qualitative research as well as any form of quantitative research.

Additional rounds of qualitative research may be necessary to whittle down the number of packaging alternatives that may have been presented to the client after the initial exploratory research. In these instances, it is appropriate for a design firm to explore various ideas with consumers and select final "winning" packaging concepts to optimize for later testing. However, once the question moves from that of concept reduction and optimization to that of concept selection, responsibility for designing and conducting research should move away from the design firm and towards the manufacturer and their outside research suppliers.

This is not to say that the design firm should be kept blind to the research. On the contrary, designers should have input into the discussion guide and be invited to attend the research, as their expertise is valued. However, the design firm should not be placed in the driver's seat. After all, their creations are being evaluated and objectivity issues may arise when the design firm has a heavy hand in moderator guide development, managing the field, moderating and report writing.

Some design firms will argue that


since they hire outside moderators, the research is completely objective. However, as the design firm is the moderator's client, the moderator may be hesitant to push back too hard when the line of objectivity becomes blurred. In addition, while an outside moderator may be conducting the groups, clients should question who is actually writing the report that will ultimately contain recommendations. Oftentimes, to keep costs down, a moderator is just hired to speak with consumers and not to write a report.

In addition to further rounds of qualitative research, manufacturers should be extremely wary of design firms pushing quantitative offerings. In the world of design, among other objectives, quantitative research techniques serve to determine whether a proposed new packaging alternative provides a significant increase in purchase intent over the existing package. In addition, a good piece of quantitative research will diagnose the features of each concept that are driving purchase interest (or not driving purchase interest). As the question has moved from concept development to concept evaluation, it is clear that the design firm has a vested interest in the outcome of this research and thus responsibility for its design, management and analysis should rest with the manufacturer.

If possible, this quantitative testing should be done with 3-D comps of each concept. As packaging is tangible, manufacturers should be careful to avoid misperceptions of use that can arise when testing is done 2-D. It is in producing these comps that the design firm can provide the most value for quantitative research. Many design firms can forge relationships for short-run manufacturing of designs to enable production of concepts. This testing could be done as in-home use tests or as central location tests. Of course, it is best to conduct this research among a national sample to control for geographic bias.

### Cost much more

In addition to controlling for bias, there is another practical reason why manufacturers should turn to alternative sup-



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pliers for their quantitative work. Pretending for a moment that you have the world's most honest design firm working for you, it will simply cost much more money to have your design firm run quantitative research for you than if you were to hire an alternative supplier. If the firm's true core competency is design, chances are the firm does not have a team of quantitatively-trained researchers on staff and they will have to hire out the same firms you would to design, field and analyze the research. The design firm will have to charge a markup to make it worth their while and thus you will be overpaying for the research.

The role of the design firm in the research process is analogous to the typical way advertisers work with advertising agencies. As a whole, advertisers are comfortable with agencies, or, to be more specific, account planning groups within agencies, conducting exploratory research among a brand's core audience to provide more focus in the creative process. However, once the objective of the research changes from

that of concept development to that of concept effectiveness, the responsibility for research execution should shift from the agency to the brand's research manager.

A rigorous research plan for packaging research should take the following approach:

1. An audit of past research on packaging – with the design agency and manufacturer equally involved.
2. Exploratory ethnographies with consumers to identify unmet needs and stimulate creative thinking. Responsibility for research design and management can rest with the design firm as this may be an important part of their process. Clients should be invited to attend the ethnographies.
3. A working session with design agency, manufacturer and all appropriate stakeholders to debrief ethnographies, outline requirements for packaging and brainstorm ideas.
4. Evaluative research with consumers to reduce the number of concepts and select those to optimize for quantitative testing. Responsibility for

conducting this research should rest with the manufacturer.

5. Quantitative concept testing to determine if the change in packaging is related to a stated increase in purchase intent over control. The manufacturer must drive this research.

### **Don't relinquish control**

There is no question that design has taken an increased importance in marketing. Design is instrumental in providing shelf impact and ensuring consumer delight once the product has been taken home or to its ultimate place of consumption. In addition, design firms should be commended on their willingness to let consumers help in the design process. However, while there are some types of research appropriate for a design firm to conduct to aid in their creative process, manufacturers should not relinquish control of any research undertaken to ultimately select winning concepts to bring to quantitative testing or research designed to decide whether to change the existing package. | Q



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## Survey Monitor

continued from page 10

Consumers are 50 percent more likely to be influenced by word-of-mouth recommendations from their peers than by radio/TV ads – a slightly higher level of influence/trust than was found in the 2004 study co-authored by Intelliseek and Forrester.

The research also found important correlations between consumers who regularly skip over or delete television or online ads and those who shape, create and absorb consumer-generated media (defined as experiences, opinions and advice posted on the Internet by consumers for others to read and share). Active ad-skippers, for example, are 25 percent more likely to create and respond to CGM on Internet message boards, forums and blogs. “The advertising landscape is changing, forcing marketers to broaden and redefine the concepts of media, influence and audience reach,” says Mike Nazzaro, Intelliseek CEO.

During August 2005, Intelliseek polled a representative online sample of 660 online consumers and explored attitudes and opinions across key CGM venues, including Internet message boards, forums, blogs, direct company feedback and offline conversation.

Word-of-mouth behavior among “familiar” trumps all forms of advertising and is more trusted than news or expert commentary, the study found. In addition, positive word-of-mouth from a personal acquaintance carries just as much impact as negative word-of-mouth. Bloggers create an

enormous amount of CGM across numerous sources, elevating their overall influence. “This has critical implications for brands that nurture evangelism, brand loyalty and advocacy,” Nazzaro says.

Interestingly, WOM/CGM has more impact on consumer attitudes about products than positive or negative news coverage. Public comments by employees also carry important credibility compared to traditional ad vehicles, a point explored in a recently published white paper on employee blogging by Intelliseek and Edelman.

While fewer than 20 percent of respondents indicated they use or own digital video recorders or TiVo-like services that permit ad skipping, a majority indicated that they “deliberately skip over advertising on the television.” In addition, ad-skippers are more likely to learn about new product trends and brands than consumers who do not regularly skip ads. They are 25 percent more likely to want to “create a dialogue” with others on Internet message boards and forums, especially to learn new information and have questions answered.

Teens lead all segments in overall CGM creation but remain more trusting of advertisers. Nearly 30 percent of teens now actively create CGM by sending photos via their cell phones, 45 percent have experimented with or created a blog, and nearly 10 percent subscribe to RSS feeds.

Men are more likely to spend time on Internet message boards, forums, and discussions, while women expressed a higher tendency to “forward something (they) had found on

the Internet to others,” especially information on “things like scams or computer viruses.” About equal numbers of men and women create blogs.

Consumers are on track to post close to two billion comments on the Internet by the end of 2005, a significant increase over the previous year, according to Intelliseek estimates.

Key industries that are susceptible to CGM impact: health/medical, auto, electronics, video games and music. Intelliseek’s research also looked closely at consumer attitudes toward artificial buzz or so-called shill marketing, in which consumers are paid or offered incentives to recommend products or brands. One-third would be disappointed if a trusted contact did not carefully disclose a paid or incentive-based relationship, 26 percent said they would never trust the opinion of that friend again, and 30 percent said they would be less likely to buy a product/service. For more information visit [www.intelliseek.com](http://www.intelliseek.com).

## Portrait of a news/talk radio listener

Radio news/talk programming attracts listeners with distinct lifestyle preferences and highly desirable socioeconomic characteristics, according to an analysis by Scarborough Research, New York. News/talk listeners, who account for one-fifth (20 percent) of all adults in the U.S., are affluent and educated consumers. Those who listen to radio news/talk programming are 41 percent more likely than the general population to have annual household incomes of \$75,000 or more. Correspondingly, they are 67 percent more likely to have graduated from a four-year college and 95 percent more likely than the average American to hold a post-graduate degree. In general, news/talk programming appeals more to men (about 58 percent of the audience) than women (42 percent).

While news/talk listeners tend to be older (42 percent are 55+), they are also extremely active and enjoy a broad range of sporting and leisure activities. News/talk listeners enjoy snow skiing (they are 44 percent more

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San Francisco-based Telephia, a provider of performance measurement information to the mobile phone industry reports that women outpaced men in purchasing ringtones by two to one during the third quarter of 2005. Sixty-nine percent of mobile ringtones were bought by women, while purchases by men comprised 31 percent of the total revenue share, according to a Telephia Mobile Audio report, which tracks purchase activity for mobile ringtones, including traditional ringtones, realtones, ringback tones and voicetones. Overall, more than 9 percent of the wireless population purchased a ringtone during the last quarter.

“Ringtones provide mobile users with personalization and individualization,” says Brian Monighetti, senior product manager, Telephia. “Cell phones have become everyday accessories and consumers are looking for creative ways to make a personal statement with their devices. The strong demand for ringtones shows the kind of distinctive individuality music generates.”

The majority of buyers for the most popular ringtones skewed a younger age demographic. Telephia data shows that 40 percent of those who purchased the “Hollaback Girl” ringtone by Gwen Stefani fell into the 18-24-year-old age group, while 51 percent were 25-34-year-olds. Twenty-nine percent of those who purchased the summer hit “Don’t Cha” by The Pussycat Dolls were 18-24 years old, with 59 percent falling into the 25-34 age group. Bow Wow & Omarion’s “Let Me Hold You” and “Just A Lil’ Bit” by 50 Cent skewed a younger demographic, with the majority of those who purchased the ringtones being 18-24. Rounding out the top five ringtones for the third quarter of 2005, buyers for Mariah Carey’s “We Belong Together” were evenly split among 18-24 and 25-34-year-olds, with revenue shares of 38 and 36 percent, respectively. For more information visit [www.telephia.com](http://www.telephia.com).

### Parents change food-buying habits

St. Petersburg, Fla.-based research firm HealthFocus International’s 2005 Trend Report shows that parents have increasing concern for the health of their children and have dramatically changed the way they make their purchase decisions over the last two years.

The study shows that sugar and high fructose corn syrup top the list of sweeteners parents are avoiding. They also are showing greater concern about buying highly processed foods and prefer natural products and products with better nutrition.

According to those surveyed, 37 percent of families have decreased their use of sugar and 29 percent have decreased their use of high fructose corn syrup over the last two years. In part, they have replaced these sweeteners with more natural ingredients such as honey, maple syrup or fruit juices/concentrates which have shown an increase in usage over the last two years.

“Our research shows that parents prefer to buy natural foods and are avoiding highly processed food,” says Linda Gilbert, president of HealthFocus International. “In fact, highly processed food ranks as the third highest concern for parents when purchasing food for their families.”

The data also show that when shoppers with children in the household are making buying decisions, they opt for better nutrition, better taste and convenience rather than lower calories. When asked about the importance of label statements affecting their buying decision, the survey found that the top five things these shoppers are looking for on food labels are: fresh; good source of calcium; grown without pesticides; whole grain; supports the immune system. “Low in calories,” “low carbohydrate” and “low fat” were all listed in the bottom 10 for importance of labeling statements. For more information visit [www.healthfocus.com](http://www.healthfocus.com).

### Many consumers trust peers more than ads

Consumer trust toward traditional advertising is being challenged by growing confidence in consumer-

generated media (CGM) and the recommendations of other consumers, according to a study of consumer behavior by Cincinnati researcher Intelliseek Inc.

A follow-up to a 2004 study on trust in advertising, the 2005 Consumer-Generated Media (CGM) and Engagement Study finds that, compared to traditional advertising, word-of-mouth (WOM) behavior continues to grow in importance in consumer awareness, trial and purchase of new products.

Consumers are 50 percent more likely to be influenced by word-of-mouth recommendations from their peers than by radio/TV ads - a slightly higher level of influence/trust than was found in the 2004 study co-authored by Intelliseek and Forrester.

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lege and 95 percent more likely than the average American to hold a post-graduate degree. In general, news/talk programming appeals more to men (about 58 percent of the audience) than women (42 percent).

While news/talk listeners tend to be older (42 percent are 55+), they are also extremely active and enjoy a broad range of sporting and leisure activities. News/talk listeners enjoy snow skiing (they are 44 percent more likely than the typical consumer to have gone in the last 12 months), golfing (39 percent more likely to have gone), and volunteer work (19 percent more likely). This profile translates into formidable purchasing clout, with news/talk listeners outpacing the general U.S. population in many significant retail categories, such as automobiles, electronics and financial services.

When it comes to auto purchases, they are 15 percent more likely than the average consumer to live in a household that is planning to spend \$30,000 or more for a new vehicle in the next 12 months. Those who listen to news/talk also like to stay current with the latest leisure and entertainment technology. They are 37 percent more likely than the general population to live in a household that has spent \$500 or more on a camera or accessories in the past 12 months and 29 percent more likely to live in one that has spent \$1,000 or more on stereo equipment or a home music system in the past year.

Additionally, financial services emerged as an area in which news/talk listeners are worth their weight in gold. They are 47 percent more likely than the norm to live in a household that owns a money-market account and 47 percent more likely to live in one that owns mutual funds. They are also willing to pay for financial advice, with 14 percent reporting that their households have used a full-service stockbroker in the past 12 months and 16 percent reporting that their households have used a financial planner in the past year. Source: Scarborough Research, Scarborough USA+ 2005 Release 1. The Scarborough USA+ database is a national study of consumer behaviors,



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## Product and Service Update

continued from page 14

Naperville, Ill., has launched D&A, a new framework to help marketers understand the complexities of the consumer journey to purchase. D&A quantifies the contribution to sales of those factors that create demand for a category and brand, as well as those that activate final choice. D&A studies combine up-front qualitative research designed to identify the demand and activation drivers for an individual brand and category with quantitative research that identifies the importance of specific demand or brand-building activities and sales activation activities. It helps marketers understand where to communicate most effectively with their target audience, what messages will be most compelling to that audience, and what activities will secure the sale when they engage in the purchasing process. For more information visit [www.millwardbrown.com](http://www.millwardbrown.com).

### New CSR system from Sector

Sector Research, Overland Park, Kan., has debuted Sector NOW, a turnkey online customer satisfaction research solution. Dynamically-generated surveys are distributed online and monitored in real-time. Results are delivered in an action-alert format which uses key industry benchmarks, historical trending and demographic analysis.

The Sector Survey Builder automatically builds surveys based upon a client's industry, product and customer type. The surveys are customer-experience oriented to address business dimensions including price value, quality and recommendation propensity.

The My Sector function e-mails surveys and monitors performance in real-time, including simultaneous survey campaigns. The Sector Analyzer function reports complete survey results with analytics in an action-alert format. Critical risk reporting identifies strengths and weaknesses across current and historical surveys. Demographic and grouping capabili-

ties provide select crosstab reporting. Industry benchmarking provides both industry and geographic comparisons for performance analysis and business improvement. For more information visit [www.sectorresearch.com](http://www.sectorresearch.com).

### ACNielsen product tracks in-store promotions

ACNielsen U.S., Schaumburg, Ill., has introduced Promotion Tracker, which provides consumer packaged goods firms with a census-based report on the status of in-store displays. Promotion Tracker reports on the status of in-store promotional displays across multiple categories at five national grocery retailers representing 40 percent of U.S. chain supermarket all-commodity volume. Reporting is available across each chain, banner, all stores within specific retailer-defined trade areas, and over 8,000 individual stores. The Internet-accessed reports tell whether a display is up, the number of displays in a given store, their location(s) and whether the promoted price is visible. Reports are planned for most major holiday and special event selling seasons beginning with the 2006 Super Bowl. For more information visit [www.acnielsen.com](http://www.acnielsen.com).

### New scaling tool from Sawtooth Software

Sawtooth Software, Sequim, Wash., has released MaxDiff/Web, a new tool for the scaling of multiple items (brands, attributes, advertising claims, job-related factors, etc.). MaxDiff is a choice-based methodology that asks respondents to identify the most and least important/preferred items from subsets of typically three to six items. Each respondent evaluates multiple subsets so that the total list of items under investigation is covered and may be placed on a common ratio scale.

The MaxDiff methodology, originally invented by researcher and academic Jordan Louviere, has many similarities to, but is different from, conjoint methodology and is appropriate for a range of research opportunities. The benefits of the methodology include greater discrimination among

items, greater discrimination among respondents on the items, and avoiding response-style bias (permitting more direct comparisons across respondents from different cultures/countries).

MaxDiff/Web may be used for conducting Web-based, CAPI or paper-based MaxDiff studies. The software also supports asking the "best" half of the question only (not requiring respondents to identify the "worst" item in each set). The software may also be used for method of paired comparisons research. Individual-level estimation of item scores employs Sawtooth Software's hierarchical Bayes (HB) engine. Results may also be exported to Sawtooth Software's latent class system for segmentation analysis. For more information visit [www.sawtoothsoftware.com](http://www.sawtoothsoftware.com).

### EZSurvey 2005 from Raosoft

Seattle research software firm Raosoft has released EZSurvey 2005 for the Internet, the latest version of its survey program. The new version provides additional security enhancements and new form design aids, especially for complex forms. The new release improves the speed and scalability of data collection for both EZSurvey database and ODBC database connectivity. Security protections are available to secure the entire data-gathering process. The EZSurvey Personal Server allows owners to collect data off-site, without dependence on an internal corporate server, and deployment enhancements are available for mobile and short messaging service modules. The new EZSurvey Enterprise Stand Alone Mail Server is designed to speed up participant notification and e-mail survey deployment. EZSurvey's online reporting has been expanded to provide more online statistical capacity. EZSurvey is a 32-bit program for use with Win200x/ME/NT/XP. The program is written in C++ and uses 14 megabytes of drive space. For more information visit [www.raosoft.com](http://www.raosoft.com).



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## How much marketing support does that new product need?

Forecasting firm BASES, Covington, Ky., has introduced Marketing Plan Analyzer, a new capability designed to help marketers understand the level of support required for a new product to be competitive in today's marketplace.

BASES Marketing Plan Analyzer draws on a database containing more than 75,000 new product marketing plans across 60 countries and more than 200 product categories. It provides data-based perspective for eight marketing plan metrics covering the full marketing mix, including media, promotion and distribution. Marketing Plan Analyzer helps a marketer assess how a new product's level of marketing support compares to others in the same category and country. Learning from the database will help clients optimize their plans, which BASES can then use to forecast sales for the new product. BASES will also mine the database to compare practices across product

types, categories and countries and to examine trends in new product marketing. For more information visit [www.bases.com](http://www.bases.com).

## ArcView 9 workbook from ESRI

Redlands, Calif.-based ESRI Press is now offering *GIS Tutorial: Workbook for ArcView 9*, which provides exercises and instructions that users can adapt to specific training needs, whether it is teaching GIS or using the book for individual study. The book takes readers through the process of using a variety of GIS functionality, from creating maps and collecting data to using geoprocessing tools and models for advanced analysis.


GIS Tutorial includes scripted exercises that use step-by-step instructions and graphics to illustrate specific ArcGIS tools and GIS workflows. Exercise assignments give precise instructions and pose real-world problem scenarios including creating a voting district map for a local elec-

tion, comparing county financial information in a map, geocoding household hazardous wastes, and analyzing populations in California cities at risk for earthquakes. A fully functioning 180-day trial version of ArcView 9 software on CD-ROM and a CD of data for working through the tutorials are included with the book. The book is available in bookstores and online retailers or can be purchased at [www.esri.com/esripress](http://www.esri.com/esripress).

## Scarborough adds five new markets

Scarborough Research, New York, has expanded its list of local market services to include consumer shopping, media and lifestyle surveys across five new markets. In 2006, for the company's Top Tier Market Studies, Scarborough will be measuring consumer patterns in 80 DMAs, as compared to the 75 surveyed in 2005.

Additionally, Scarborough will offer a Mid-Tier Local Market




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Consumer Study in six DMAs in 2006. The Mid-Tier Studies will survey adults 18+ on a variety of consumer categories including media, shopping and lifestyle behavior. Data will be collected through a single consumer questionnaire. The survey period is a point-in-time measurement that lasts six to eight weeks.

Portland, Maine; Bluefield-Beckley, W.Va.; Columbia, S.C.; Johnstown-Altoona, Pa.; Reno, Nev., and Salisbury-Ocean City, Md., are the DMAs in which the Scarborough Mid-Tier Studies will be introduced in 2006. The first data from these markets will be available in March 2006 except Portland, Maine, for which the data is available now. Bakersfield, Calif.; Chattanooga, Tenn.; Colorado Springs, Colo.; Green Bay, Wis.; and Little Rock, Ark., are the local markets that Scarborough will be adding to its roster of Top-Tier Local Markets, making a total of 80 consumer studies available. For these studies, in-depth consumer behavior and media patterns are collected via telephone. For more information visit [www.scarborough.com](http://www.scarborough.com).

### New Hispanic research panel

A new Hispanic survey panel, ¡Hola! ResearchPAYS, is now available from New York marketing firm Alternative Technology Corporation and ¡Hola! Arkansas Hispanic Media & Publishing Co. in alliance with the nonprofit League of United Latin American Citizens (LULAC). ¡Hola! ResearchPAYS will also serve as a fundraising source for many of LULAC's community projects. Companies accustomed to allocating special funds for charity now have another option for helping Hispanic communities by purchasing Hispanic market research data while giving back to the LULAC organization and its communities. Clients will gain controlled access to 100 pre-selected Hispanic panel members from LULAC's communities and be able to ask them up to 45 questions each. All surveys will be culturally

relevant and custom designed for each target and will be bilingual, presented in their language of choice, Spanish or English. ¡Hola! ResearchPAYS automatically integrates LULAC communities nationwide, allowing companies to select their panel members from a list of up to 65 variables. For more information visit [www.hola-researchpays.com](http://www.hola-researchpays.com) or <http://hola-mercadeopaga.com>.

### Briefly

Consumer Pulse, Birmingham, Mich., has opened a second facility in the Citadel Mall in Colorado Springs, Colo. This new focus, pre-recruit and viewing facility offers a 12' x 18' focus group room, viewing for five, a fully-equipped kitchen and six interviewing stations with high-speed Internet connection. Consumer Pulse's original Citadel Mall office will remain open. For more information visit [www.consumerpulse.com](http://www.consumerpulse.com).

U.K. firm Springboard has introduced electronic pedestrian monitoring in London's West End, measuring in 30 locations hourly footfall counts, continuously 24 hours a day, along Bond Street, Oxford Street, Regent Street and a number of other key streets in the area. For more information visit [www.springboard.info](http://www.springboard.info).

Netherlands-based software maker Nebu has released a new version of its panel management and sampling product, Dub Knowledge. It includes more advanced sampling procedures, relative date operator when sampling, full UNICODE support, and easier exclusion of respondents from past panel surveys. There is also a new feature called scheduled sampling which lets users set up a sample, schedule it to be drawn at the moment that a system is low on usage or ready for the moment when it is required. For more information visit [www.nebu.com](http://www.nebu.com).

London-based Research Now has

launched Irish Opinions, a research-only online panel open to people over the age of 16 and living in the Republic of Ireland. It is expected to have 30,000 members by early 2006 and will be expanded in areas of client demand thereafter. For more information visit [www.researchnow.co.uk](http://www.researchnow.co.uk) or [www.irishopinions.com](http://www.irishopinions.com).

Seattle-based QuestionPro is offering a free survey option for bloggers, Web masters, marketers, researchers and small businesses. Called a Micro Poll, it allows anyone with a Web site to instantly poll their readers with simple multiple-choice questions and then display the aggregated results. The simple software code is available for download at [www.QuestionPro.com/micropoll](http://www.QuestionPro.com/micropoll).

Greenfield Online, Wilton, Conn., is now offering the GoQuote Online Ordering system, which allows clients to price and order sample from Greenfield Online directly through the Internet anytime they want. For more information visit [www.goquote.com](http://www.goquote.com).

Chicago-based Precision Research, Inc. has a new location in Des Plaines, Ill., featuring four flexible research suites with tech support, test kitchen facilities, a usability lab and a 30-seat phone center. Other features include separate climate controls for each conference and observation room, dedicated audio tape backup and secluded waiting areas to help avoid tainted sample pools. For more information visit [www.preres.com](http://www.preres.com).

Dublin-based Research and Markets now offers RSS feeds of the research reports it sells through its Web site [www.researchandmarkets.com](http://www.researchandmarkets.com). Really Simple Syndication (RSS) is an XML-based format for content distribution. The feeds include research headlines, research summaries and links back to the firm's Web site for full reports.

## Research Industry News

continued from page 16

business; and pursuing a listing on the New York Stock Exchange.

Preparations are underway for building a new hospital in Kalkudah, eastern Sri Lanka, which will be named as the Heinrich A. Litzenroth Memorial Ward District Hospital after the GfK management board member who died in the December 2004 tsunami. The two-story hospital building, which will have between 80 and 100 beds, is being financed by donations totaling EUR 300,000 given by the employees and management board of GfK and suppliers working with GfK.

Norway-based **Future Information Research Management** (FIRM) announced in November that it has submitted an application for public listing at the Oslo Stock Exchange.

**Arbitron** announced in November that, in answer to the concerns of the NAB Committee on Local Radio Audience Measurement and of the Arbitron Radio Advisory Council, it has decided to revise its plans for including new diary instructions that tell radio survey participants to record listening to Internet and/or satellite radio as well as to over-the-air radio. Arbitron originally intended to modify its diary instructions starting with the Winter 2006 survey. "COLRAM raised the issue with us, and the Arbitron Advisory Council seconded their concerns," said Owen Charlebois, president, U.S. Media Services, Arbitron Inc., in a company statement. "While we believe that modifying the diary instructions is the right thing to do from a research quality standpoint, Arbitron has decided to address more fully our customers' concerns with a limited test of the revised instructions in 25 markets in February 2006. Implementation would follow a successful outcome, but not sooner than summer 2006."

The current diary does not ask respondents to indicate whether they listen to radio stations over the Internet or via satellite services. The revised instructions are intended to capture and report radio listening recorded by respondents regardless of the delivery vehicle.

The revised diary instructions being tested in February 2006 are meant to clarify to respondents that listening can be to over-the-air radio, Internet and/or satellite radio. The proposed instructions would also refer to Internet and satellite radio in one of the items in the diary completion checklist. Arbitron will also include an Internet and satellite reference in the illustrated diary example.

### Acquisitions/transactions

**Synovate** has acquired **Plus REMARK**, an independent full-service research company in Turkey. Plus REMARK is located in Istanbul and employs 76 staff.

Port Washington, N.Y., research firm the **NPD Group** has agreed to purchase select assets related to New York-based **ACNielsen's** information technology tracking business in Canada. NPD will offer both retail and commercial sales tracking of computers and related peripherals in Canada, as it does in the U.S.

Separately, **ACNielsen** has become the full owner of **ACNielsen Chile**, purchasing the 49 percent stake held by Cadem, its business partner in Chile since 1993.

Paris researcher **Ipsos** has acquired **Understanding UnLtd** (UU), a U.S. research company specializing in qualitative research. Based in Cincinnati, UU employs approximately 40 people and is managed by its founders Marilyn O'Brien and Denise Patton, who will keep their positions in the newly formed Ipsos Understanding UnLtd.

**Alliances/strategic partnerships**  
**Sawtooth Software**, Sequim, Wash., has established a strategic

alliance with Seattle research firm **Global Market Insite, Inc.** (GMI). GMI will act as a sales and technical support representative for Sawtooth Software in Asia-Pacific and Latin America. Netherlands-based SKIM Software Division will continue as a sales representative in the European region. Sawtooth Software customers will be able to purchase, at a preferred group discount of 15 percent, sample and e-mail invitation services (for their SSI Web surveys) through GMI's panel.

Vancouver, B.C., research firm **Vision Critical** and Dallas-based **Common Knowledge Research Services** have formed a strategic partnership which provides clients access to Common Knowledge Research Services Your2Cents online opinion panel and Vision Critical's panel management system, Panel+.

Faith Popcorn's New York marketing consultancy **BrainReserve** and PR firm **Weber Shandwick** have formed a strategic alliance. The new alliance, designed to fuse BrainReserve's "Applied Futurism" with communications, will offer clients an integrated approach to identifying the next culturally relevant trends and developing a strategy to communicate the vision. The new alliance will be led by Billee Howard and Jennifer Risi, the co-leaders of Weber Shandwick's global strategic media group, and Todd A. Myers, BrainReserve alliance chief.

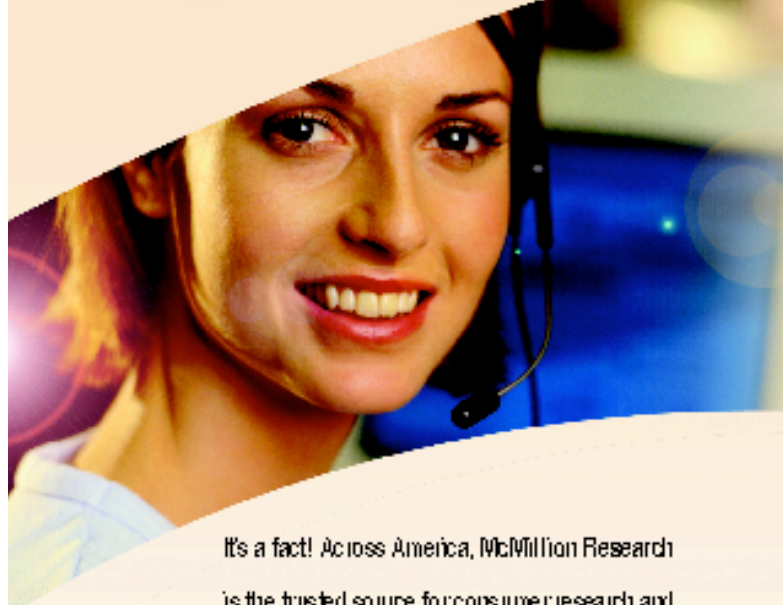
### Association/organization news

San Francisco research software company **CfMC** has been awarded the first Celebrated Company Award for outstanding volunteer efforts and support by the **Marketing Research Association**.

**The Council for Marketing and Opinion Research** (CMOR) joined with other Census advocates in celebrating their victory in convincing a House and Senate conference committee to approve \$812.237 million in federal spending for the

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U.S. Census Bureau in fiscal year 2006, rejecting a much lower funding level adopted by the U.S. Senate in September 2005. The victory is further emphasized by passage of the House bill that included the Census funding at this agreed-upon amount by the full House of Representatives with a vote of 397-19.

“The U.S. Census Bureau provides crucial data, records, and other information to a wide array of research-related interests,” says CMOR Director of Operations Donna Gillin. “Beyond the marketing and opinion research profession, the data from the Census is critical to local, state and federal government, diverse commercial interests, academia, and many non-profit organizations.”

CMOR, the American Association for Public Opinion Research (AAPOR), and other organizations feared that budget cuts would severely hamper the Bureau’s capacity to collect and report information.

Howard Gershowitz, CMOR’s board of directors co-chair, credits the successful effort to a three-prong strategy. “We were proactive in lobbying the offices of all 26 conferees,” he says. “We launched a member letter-writing campaign and we had strong alliances with other groups for whom a fully funded U.S. Census is critical.”

CMOR has long supported the Census and its impact on the marketing and opinion research profession and was an official partner of the Census Bureau during the 2000 Census to actively educate respondents and encourage participation. During this recent effort, CMOR worked in conjunction with AAPOR, other industry associations, as well as other stakeholders who formed the U.S. Census Project.

In addition to taking a census of the population every 10 years, the Census Bureau conducts censuses of economic activity and state and local governments every five years. The next census of the population

is planned for 2010, but every year the Census Bureau conducts more than 100 other surveys. The fiscal year 2006 funding would have an impact on all of these activities.

Don Marek has been named executive director of the **Marketing Research Institute International** (MRII). The MRII was formed by the MRA and the University of Georgia as a not-for-profit educational institute in 1996. Its purpose is to create and deliver comprehensive professional education and training in marketing research.

### Awards/rankings

**Opinion Research Corporation** (ORC), Princeton, N.J., announced that the National Alcohol and Drug Addiction Recovery Month Web site, which is developed and maintained by ORC, recently won a Gold Award in the MarCom Creative Awards 2005 competition, an honor that recognizes excellence in marketing and communications.

Findlay, Ohio-based mystery shopping firm **Corporate Research International** was ranked No. 396 on the annual Inc. 500 list of the fastest-growing private companies in the country, with three-year sales growth of 346.1 percent. The company employs 104 people.

**Harris Interactive**, Rochester, N.Y., was named a winner in the Service category of the IDG InfoWorld 100 awards for 2005. The awards honor IT projects that demonstrate the most creative use of technologies to further business goals. Harris Interactive won for its Web/telecom integration project or ICW as it is known at Harris Interactive. ICW integrates telephone agent-based data collection and Web-based data collection - providing centralized control over voice interviewers, telephone and online sample - and combines market research data into a single, real-time reportable data store. Nominations for the award were submitted by

*InfoWorld* readers, technology partners and end-user companies in late summer 2005.

### New accounts/projects

Fort Lauderdale, Fla., research firm **Simmons** has signed a multi-year, multimillion-dollar agreement to provide the **Interpublic Group of Companies** (IPG) with new and renewed Simmons products. The contract will provide IPG, an organization of advertising agencies and marketing-services companies, with new and expanded access to Simmons Market Research consumer data.

**ACNielsen U.S.**, Schaumburg, Ill., has a new and expanded agreement with **Winn-Dixie** under which the grocer will utilize ACNielsen as its preferred provider of syndicated sales information and consumer insights. An on-site ACNielsen team will lead Winn-Dixie’s category management initiatives from a syndicated data perspective.

### New companies/new divisions/relocations/expansions

Research software and services firm the **Analytical Group Inc.** recently moved to a new office building in Scottsdale, Ariz., increasing the phone center to 72 WinQuery interviewing stations.

London-based **ResearchNow plc** has opened a New York sales office and named Scott Toro and Alex Sunnerstam client service/sales director. Heading up the new U.S. team will be Research Now Managing Director Andrew Cooper, who will remain based in London. Sadia Perveen, Research Now’s client service manager will move from London to the New York office.

**Millward Brown** has launched its global brand consulting practice in Asia Pacific. The practice, Millward Brown Optimor, will be headed by Yixin Zhang, who has been appoint-



ed director. She will be based in Beijing.

**GfK Healthcare** has expanded into Asia by opening a health care division in Thailand. The Thailand health care division, known as GfK Healthcare, will be headed by Alan John.

### Company earnings reports

In results for the quarter ended September 30, 2005, **SPSS Inc.**, Chicago, reported its fourth consecutive quarter of record revenues, with third-quarter 2005 net revenues of \$58.3 million, compared to \$53.5 million in the third quarter of 2004, and earnings per diluted share (EPS) of \$0.22, compared with \$0.05 in the same period last year. Net earnings for third-quarter 2005 included a \$1.0 million, or \$0.05 per diluted share, non-cash income tax charge largely representing a reassessment of the global deferred income tax accounts.

New license revenues increased 22 percent to \$27.4 million from the third quarter of 2004. This increase was driven by double-digit growth in both the company's tools and applications offerings. Operating income in the 2005 third quarter was \$8.2 million, or 14 percent of total revenues, compared to \$1.2 million, or 2 percent of total revenues, in the same quarter last year.

For the nine months ended September 30, 2005, net revenues totaled \$173.8 million, with EPS of \$0.55, compared with \$163.6 million and \$0.11, respectively, for the same period last year. New license revenues increased 14 percent to \$77.8 million for the first nine months of 2005. Operating income totaled \$19.4 million for the first nine months of 2005, or 11 percent of total revenues, up from \$2.9 million, or 2 percent of total revenues, for the same period in 2004. Operating expenses declined by 4 percent from the prior year.

Cash totaled \$59.1 million, as of September 30, 2005, up from \$37.1 million as of December 31, 2004.

Net cash flow from operating activities was \$34.1 million for the nine months ended September 30, 2005, compared with \$8.5 million for the same period last year.

New York-based **NetRatings, Inc.** reported third-quarter revenues of \$16.8 million, an 8 percent increase over revenues of \$15.6 million in the third quarter of 2004. Net loss for the third quarter of 2005 was (\$3.7 million), or (\$0.10) per share, on approximately 36.2 million shares. This compares with a net loss of (\$4.3 million), or (\$0.12) per share, in the third quarter of 2004, on approximately 34.8 million shares.

During the quarter, the company recorded a restructuring charge of \$1.7 million. The charge negatively affected net earnings by \$0.05 per share and was related to severance expenses associated with a restructuring in NetRatings' European business.

On a pro forma EBITDA basis, the company reported a third-quarter loss of (\$488,000), or (\$0.01) per share. This compares with a pro forma EBITDA loss in the third quarter of 2004 of (\$1.2 million), or (\$0.04) per share.

**National Research Corporation**, Lincoln, Neb., reported third-quarter revenues of \$10.1 million compared with revenues of \$9.3 million for the same period in 2004. Net income for the quarter ended September 30, 2005 was \$2 million, or \$0.29 per basic and diluted share, compared with net

income of \$1.7 million, or \$0.24 per basic and diluted share, in the prior year period. Revenues for the nine months ended September 30, 2005 were \$23.9 million compared with revenues of \$23.3 million for the same nine-month period of 2004. Net income for the nine months ended September 30, 2005 was \$3.7 million, or \$0.52 per basic and diluted share, compared with \$3.6 million, or \$0.50 per basic and diluted share, in the prior-year period.

At **Harris Interactive**, Rochester, N.Y., revenue for the first fiscal quarter of 2006 was \$48.9 million, up 24 percent when compared with \$39.3 million of revenue from the same period a year ago. U.S. revenue was \$37.1 million, up 26 percent from the \$29.6 million of revenue reported for the same period a year ago. European revenue was \$11.8 million, up 21 percent from the \$9.8 million of revenue reported for the same period a year ago. Favorable foreign currency exchange rates added \$0.2 million to revenue for the first fiscal quarter of 2006.

Global Internet revenue for the first fiscal quarter of 2006 was \$28.0 million, up 16 percent from Internet revenue of \$24.2 million for the same period a year ago. U.S. first fiscal quarter 2006 Internet revenue was \$24.8 million, up 14 percent when compared to the \$21.7 million from the same period a year ago. European Internet revenue for the first fiscal quarter of 2006 was

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\$3.2 million, up 29 percent from the \$2.5 million of Internet revenue reported for the same period a year ago. Internet revenue comprised 57 percent of total revenue, 67 percent of the U.S. revenue and 27 percent of the European revenue.

Operating income for the first fiscal quarter of 2006, which included \$0.7 million of non-cash stock-based compensation expense, was \$2 million, or 4.1 percent of revenue, down 25 percent when compared to operating income of \$2.7 million (which included no stock-based compensation expense), or 6.9 percent of revenue for the same period a year ago.

Net income for the first fiscal quarter of 2006 was \$1.2 million, or \$0.02 per diluted share, compared with net income of \$1.7 million, or \$0.03 per diluted share for the same period a year ago. Results for the first fiscal quarter of 2005 include WirthinWorldwide from the date of acquisition, September 8, 2004.

Paris-based **Ipsos** posted revenues of EUR 168.9 million for the third quarter of 2005, an increase of 19.1 percent on the same period in 2004. Over the first nine months of 2005, revenues were EUR 490.7 million, a 14.7 percent improvement on the first nine months of 2004.

With sales up 28.8 percent from EUR 487.1 million to EUR 627.5 million, Germany-based GfK Group posted good results for the first nine months of the current year. The firm also increased EBIT after income from participations by 84.6 percent from EUR 58.3 million to EUR 107.6 million. This figure does not take into account non-recurring costs of EUR 5.9 million attributable to the integration of NOP World.

The above-average rise in EBIT after income from participations is essentially due to four factors: strong growth in the core business, the business performance of the NOP World subsidiaries, positive currency effects and the sale of GfK's 50 percent stake in IHA-IMS

Health, Switzerland. This sale was reported by GfK at the beginning of the year. At 17.1 percent, the margin, i.e., EBIT after income from participations in relation to sales, was also higher than in the same period for the previous year.

Consolidated total income after minority interests rose from EUR 34.6 million to EUR 62.3 million.

**Greenfield Online**, Wilton, Conn., reported that net revenues totaled \$23.1 million for the third quarter of 2005 as compared with \$12.0 million for the same period a year ago and \$26.3 million in the second quarter of 2005. Revenue from Ciao, the company's European subsidiary, totaled \$8.1 million, including \$2.7 million in revenue from the Ciao comparison-shopping business. The decline in revenue was primarily due to a 17 percent sequential quarterly revenue decline in North America. Ciao revenues were flat as compared to the second quarter.

Gross profit totaled \$16.4 million or 71 percent of revenues for the third quarter of 2005, as compared with \$9.5 million or 79 percent of revenues in the prior year period, and 73 percent of revenue in the second quarter of 2005.

Operating income was \$0.8 million, or 4 percent of revenue for the third quarter of 2005, including a one-time charge of \$1 million related to the management changes the company announced on September 29, 2005. Excluding this charge, operating income was \$1.9 million or 8 percent of revenue. This compares to operating income of \$2.3 million or 19 percent of revenue for the prior year period, and is down sequentially from \$4.5 million or 17 percent of revenue in the second quarter.

For the third quarter 2005, adjusted EBITDA was \$3.5 million or 15 percent of revenues, including the one-time charge, as compared to \$3 million or 25 percent of revenue for the prior year period. Excluding the one-time charge, third quarter 2005

adjusted EBITDA was \$4.6 million, or 20 percent of revenue.

Net income was \$1.6 million including the one-time charge, as compared with \$1.2 million for the prior year period. Net income for the third quarter 2005, excluding the one-time charge, was \$2.6 million. Cash flow from operations was \$7.2 million for the third quarter as compared to \$1.9 million for the prior year period and \$6.7 million in the second quarter.

**FIND/SVP, Inc.**, New York, reported revenues in the third quarter were \$11,433,000, an increase of 15 percent versus revenues of \$9,915,000 in the prior year. Net income attributable to common shareholders for the third quarter was \$435,000, or \$.02 per basic and fully diluted share, a 47 percent increase over income of \$296,000, or \$0.02 and \$0.01 per basic and fully diluted share, respectively, in the third quarter of the prior year.

EBITDA for the quarter was \$1,083,000, a 26 percent increase over EBITDA of \$859,000 in the prior year, and a 25 percent increase over adjusted EBITDA of \$867,000 reported in the second quarter of 2005. Operating income for the third quarter increased 28 percent to \$800,000 compared to \$623,000 in the prior year.

The EBITDA, operating income and net income attributable to common shareholders results include stock compensation expense of \$141,000, \$126,000 and \$204,000 for the third quarter of 2005, the third quarter of 2004, and the second quarter of 2005, respectively.

For the nine months ended September 30, 2005, revenues were \$31,548,000, an increase of 8 percent versus revenues of \$29,232,000 one year earlier. Net loss attributable to common shareholders for the nine months was (\$101,000), or (\$0.01) per share, a 93 percent improvement over a loss of (\$1,378,000), or (\$0.08) per share, in the same period of the prior year.

# 2006

# Mystery Shopping

## Providers Directory



This directory was compiled by sending listing forms to companies that have advertised a specialization in mystery shopping. We list over 300 firms. The directory has been redesigned for 2006 to include more information to better help you find a firm that meets your mystery shopping needs. In addition to the company's vital information, we've included a new cross-index section of the type of mystery shopping services they offer (audio record shops, competitor shops, etc.). We have also provided an expanded geographic cross-index to help you find a provider in a specific region. Want even more expanded search options? Use the online version of this directory at [www.quirks.com](http://www.quirks.com).

### Table of Contents

<b>Directory of Mystery Shopping Firms</b> . . . . .	<b>p. 92</b>	<b>Geographic Cross-Index</b> . . . . .	<b>.108</b>
<b>Cross-Index of Mystery Shopping Services</b> . . . . .	<b>.104</b>	USA-East Coast . . . . .	.108
Audio Record Shops . . . . .	.104	USA-South . . . . .	.108
Competitor Shops . . . . .	.104	USA-Midwest . . . . .	.108
Incentive-Based Programs . . . . .	.104	USA-Mountain . . . . .	.109
Integrity/Employee Theft Audits . . . . .	.105	USA-Southwest . . . . .	.109
Merchandising Audits . . . . .	.105	USA-West Coast . . . . .	.109
Merchandising Services . . . . .	.105	Canada . . . . .	.110
Online Reporting of Shops . . . . .	.105	Mexico . . . . .	.110
Operational Audits . . . . .	.106	Caribbean . . . . .	.110
Price Audits . . . . .	.106	Central & South America . . . . .	.110
		Europe . . . . .	.110
		Australia/New Zealand . . . . .	.110
		Asia . . . . .	.110
		Africa . . . . .	.110
		Middle East . . . . .	.110

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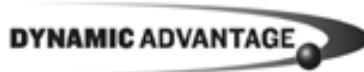
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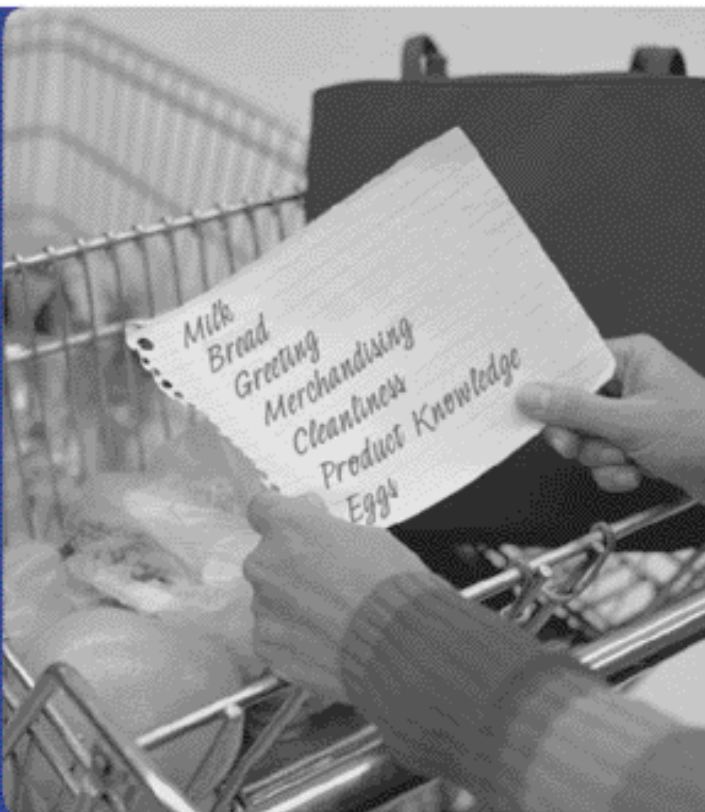
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www.ulrichresearch.com

**United Marketing Research**

Lubbock, TX  
Ph. 806-744-6740  
umr220@door.net  
www.ums promo.com

**Varga Market Research Services**

Orlando, FL  
Ph. 407-472-5851  
taniav@vargaresearch.com  
www.vargaresearch.com

**Venture Research Corporation**

Green Bay, WI  
Ph. 920-496-1960 or 800-842-8956  
jkostrski@venturegb.com  
www.venturegb.com

**Video Eyes LLC**

Fairfax, VA  
Ph. 703-995-3131  
mbare@videoeyes.net  
www.videoeyes.net

**Voter Consumer Research**

Houston, TX  
Ph. 281-893-1010  
dan@vcrhouston.com  
www.vcrhouston.com

**Ward Research, Inc.**

Honolulu, HI  
Ph. 808-522-5123  
wrstaff@wardresearch.com  
www.wardresearch.com

**WestGroup Research**

Phoenix, AZ  
Ph. 602-707-0050 or 800-999-1200  
bethsmith@westgroupresearch.com  
www.westgroupresearch.com

**Williams - Jamal, Ltd**

Las Vegas, NV  
Ph. 702-369-1125  
info@williams-jamal.com  
www.wjlpinevada.com

**Search, select and sit back**

The mystery shopping directory on  
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# Mystery Shopping Services Index

## Audio Record Shops

A Customer's Point of View, Inc.  
 A Total Resource Group  
 A.I.M. Field Service  
 AAR/All About Research  
 Amusement Advantage, LLC  
 B. Business Solutions, Inc.  
 BAI - Asia  
 BAI - South America  
 Bare Associates International, Inc.  
 Barnes Research, Inc.  
 Bartels Research Corp.  
 Battre Affarer/Better Business  
 Confero, Inc.  
 Convergys Customer Intelligence  
 Customer 1st  
 Devon Hill Associate, LLC  
**DSG Associates, Inc.**  
 ESA Market Research Ltd.  
 Excel Shopping and Consulting  
 Field & Research Matters Ltd.  
 First Glance  
 GfK-NOP Mystery Shopping  
 Gulf View Research, LLC  
**Informa Research Services, Inc.**  
 ingather research-denver  
 InGold Marketing Assistance Group, Ltd.  
 IntelliShop  
 Ipsos North America  
 Just The Facts, Inc.  
 Lodge Service - React Surveys NV/SA  
 Market Alternative, Inc.  
 Market Research Services  
 Marketing Endeavors  
 MarketWise Consulting Group, Inc.  
 Ann Michaels and Associates Ltd.  
 Mystery Shopper Pros  
 Mystique Shopper, LLC  
 National Field & Focus, Inc.  
 National Shopping Service  
 Opinion Polling Service®  
 Opinions, Ltd.  
 Pacific Research Group  
 Pan Research, Ltd.  
 Performance Insights  
 Performance Plus  
 Person to Person Quality  
 Premier Service Inc.  
 PWI Research  
 QualityWorks Associates  
 The Quest for Best Mystery Shoppers  
 Quest Marketing Group, Inc.  
 Quinn Marketing and Communications  
 Rast Marketing Research  
 Reyes Research  
 J.M. Ridgway Co., Inc.  
 Ritter Associates  
 Roe Smithson & Asociados  
 Rothermel Research, Inc.  
 Sandia Market Research  
 Bernadette Schleis & Associates, Inc.  
 Scholl Market Research, Inc.  
 Sensus Research, Inc.  
 Service Alliance, Inc.  
 Service Excellence Group, Inc.  
 Service Impressions  
 Service Sleuths  
 ServiceTRAC, LLC  
 The Shadow Shopper of Georgia, Inc.  
 Shop'n Chek Canada  
 Shoppers' View  
 Signature Worldwide  
 TestTrack Research, Inc.  
 TrendSource

Varga Market Research Services  
 Venture Research Corporation  
 Video Eyes LLC

## Competitor Shops

A Closer Look  
 A Total Resource Group  
 A.I.M. Field Service  
 AAR/All About Research  
 Any Small Town Market Research  
 AQ Services International, Asia  
 AQ Services International, Europe  
 AQ Services International, Japan  
 Athena Research Group  
 B. Business Solutions, Inc.  
 BAI - Asia  
 BAI - South America  
 Bare Associates International, Inc.  
 Bare Associates Int'l. Europe  
 Barnes Research, Inc.  
 Bartels Research Corp.  
 Battre Affarer/Better Business  
 Frances Bauman Associates  
 Beyond Hello Inc.  
 Business Evaluation Services  
 Certified Marketing Research Services  
 Check Mark, Inc.  
 COHESIUM Research  
 Confero, Inc.  
 Connections, Inc.  
 Consumer Pulse, Inc.  
 Convergys Customer Intelligence  
 Creative & Response Rsch Svcs. (Australia)  
 Creative Images Associates, Inc.  
 Cross Financial Group  
 Customer 1st  
 Customer Perspectives  
 Customer Service Experts, Inc.  
 Data Quest, Ltd.  
 Devon Hill Associate, LLC  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
 ESA Market Research Ltd.  
 Essman/Research  
 Excel Shopping and Consulting  
 Feedback Plus, Inc.  
 Field & Research Matters Ltd.  
**Field Facts Worldwide**  
 Field Surveys & Audits, Inc.  
 First Glance  
 Focus on Service, LLC  
 J. Franke Enterprises  
 Freeman Group  
 Galli Research Services  
 Galloway Research Services  
 GfK GRAL - ITEO  
 GfK Market Analysis Ltd.  
 GfK Turkey  
 GfK-NOP Mystery Shopping  
 Gulf View Research, LLC  
 Herron Associates, Inc.  
 Hoed Mystery Shopping  
 Horizon Research Services  
 ICC Decision Services  
 IMAGES Market Research  
**Informa Research Services, Inc.**  
 ingather research-denver  
 Innotech Market Research Ltd.  
 Integrated Research Associates, Inc.  
 IntelliShop  
 Ipsos North America  
 IRI Information Research Inc.  
 J & S Interviewing, Inc.  
 Just The Facts, Inc.  
 Karla Kava, Inc.  
 Kinesis  
 Kirk Research Services, Inc.  
 Kiyomura-Ishimoto Associates  
 Kramer Marktforschung GmbH  
 Liberty Research Services, LLC  
 Lodge Service - React Surveys NV/SA  
 M.A.T. On-Site Research  
**Maritz Research**  
 Market Alternative, Inc.  
 Market Mix, Inc.  
 Market Research Services  
 Market Viewpoint  
 Marketing Endeavors  
 Marketing Systems Unlimited Corp.  
 Marketrends, Inc.  
 MarketWise Consulting Group, Inc.  
 Meyers Research Center  
 Ann Michaels and Associates Ltd.  
 Mintel  
 MVP In The Field Services  
 The Mystery Guest Group  
 Mystery Shopper Pros  
 Mystique Shopper, LLC  
 National Field & Focus, Inc.  
 National Shopping Service  
 Opinion Polling Service®  
 Opinions, Ltd.  
 Pacific Research Group  
**PAI-Productive Access, Inc.**  
 Pan Research, Ltd.  
 Peak Performance Mystery Shopping  
 Perception Strategies, Inc.  
 Percy & Company Research  
 Performance Insights  
 Person to Person Quality  
 Phantom Shopping  
 Precision Research Inc.  
 Premack & Assts. of Pinellas Co., Inc.  
 Premier Service Inc.  
 Prisma Options Ltd.  
 Professional Management Services  
 Proforma Consulting Limited  
 PWI Research  
 Q M S  
 Quality Check  
 Quality Eye  
 QualityWorks Associates  
 The Quest for Best Mystery Shoppers  
 Quest Marketing Group, Inc.  
 Quinn Marketing and Communications  
 Rast Marketing Research  
 RDAssociates, Inc.  
 Research Strategies, Inc.  
 Retail Diagnostics, Inc.  
 Reyes Research  
 J.M. Ridgway Co., Inc.  
 Ritter Associates  
 Roe Smithson & Asociados  
 Rothermel Research, Inc.  
 RQA, Inc.  
 Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
 Scholl Market Research, Inc.  
 Sensus Research, Inc.  
 Serunian Investigations & Mystery Shopping  
 Service Alliance, Inc.  
 Service Excellence Group, Inc.  
 Service Impressions  
 Service Research Corporation  
 Service Sleuths  
 ServiceTRAC, LLC  
 Shop'n Chek Canada  
 Shop'n Chek Worldwide  
 Shoppers' View  
 SHOPPERS, Inc.  
 Sights On Service, Inc.  
 Signature Worldwide  
 Societe DMS (Dynamic Marketing Svcs.)  
 SPECT  
 Stewart International Associates  
 Sutter Marketing, Inc.  
 Taylor Research, Inc.  
 TestTrack Research, Inc.  
 Texas Shoppers Network, Inc.  
 TNS  
 TrendSource  
 Varga Market Research Services  
 Venture Research Corporation  
 Video Eyes LLC  
 Ward Research, Inc.

## Incentive-Based Programs

A Closer Look  
 A Customer's Point of View, Inc.  
 A Total Resource Group

A.I.M. Field Service  
 AAR/All About Research  
 Amusement Advantage, LLC  
 AQ Services International, Asia  
 AQ Services International, Europe  
 AQ Services International, Japan  
 B. Business Solutions, Inc.  
 BAI - Asia  
 BAI - South America  
 Bare Associates International, Inc.  
 Bare Associates Int'l. Europe  
 Bartels Research Corp.  
 Battre Affarer/Better Business  
 Beyond Hello Inc.  
 Business Evaluation Services  
 Certified Marketing Research Services  
 Check Mark, Inc.  
 Confero, Inc.  
 Creative & Response Rsch. Svcs. (Australia)  
 Cross Financial Group  
 Customer 1st  
 Customer Perspectives  
 Customer Service Experts, Inc.  
 Data Quest, Ltd.  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
 ESA Market Research Ltd.  
 Feedback Plus, Inc.  
 Field & Research Matters Ltd.  
 Field Surveys & Audits, Inc.  
 Focus on Service, LLC  
 J. Franke Enterprises  
 GfK Turkey  
 GfK-NOP Mystery Shopping  
 Gulf View Research, LLC  
 Gulf View Research, LLC  
 Hoed Mystery Shopping  
 Horizon Research Services  
 ICC Decision Services  
**Informa Research Services, Inc.**  
 ingather research-denver  
 InGold Marketing Assistance Group, Ltd.  
 Integrated Research Associates, Inc.  
 IntelliShop  
 Ipsos North America  
 IRI Information Research Inc.  
 J & S Interviewing, Inc.  
 Kinesis  
 Kramer Marktforschung GmbH  
 M.A.T. On-Site Research  
**Maritz Research**  
 Market Dynamics Research Group, Inc.  
 Market Research Services  
 MarketWise Consulting Group, Inc.  
 Meyers Research Center  
 Ann Michaels and Associates Ltd.  
 MVP In The Field Services  
 The Mystery Guest Group  
 Mystery Shopper Pros  
 Mystique Shopper, LLC  
 National Shopping Service  
 Opinions, Ltd.  
 Pacific Research Group  
**PAI-Productive Access, Inc.**  
 Pan Research, Ltd.  
 Peak Performance Mystery Shopping  
 Percy & Company Research  
 Person to Person Quality  
 Phantom Shopping  
 Premack & Assts. of Pinellas Co., Inc.  
 Premier Service Inc.  
 Professional Management Services  
 Proforma Consulting Limited  
 PWI Research  
 Quality Check  
 Quality Eye  
 QualityWorks Associates  
 The Quest for Best Mystery Shoppers  
 Quest Marketing Group, Inc.  
 Quinn Marketing and Communications  
 Retail Diagnostics, Inc.  
 Reyes Research  
 J.M. Ridgway Co., Inc.  
 Ritter Associates  
 Roe Smithson & Asociados  
 Rothermel Research, Inc.



RQA, Inc.  
 Sandia Market Research  
 Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
 Scholl Market Research, Inc.  
 Sensus Research, Inc.  
 Service Alliance, Inc.  
 Service Excellence Group, Inc.  
 Service Sleuths  
 Shop'n Chek Canada  
 Shop'n Chek Worldwide  
 SHOPPERS, Inc.  
 Societe DMS (Dynamic Marketing Svces.)  
 SPECT  
 TestTrack Research, Inc.  
 Texas Shoppers Network, Inc.  
 TNS  
 TrendSource

## Integrity/Employee Theft Audits

A Customer's Point of View, Inc.  
 A Total Resource Group  
 A.I.M. Field Service  
 AAR/All About Research  
 Amusement Advantage, LLC  
 Athena Research Group  
 B. Business Solutions, Inc.  
 BAI - Asia  
 BAI - South America  
 Bare Associates International, Inc.  
 Bare Associates Int'l. Europe  
 Certified Marketing Research Services  
 COHESIUM Research  
 Data Quest, Ltd.  
 Field & Research Matters Ltd.  
 First Glance  
 Freeman Group  
 Galli Research Services  
 GfK GRAL - ITEO  
 Gulf View Research, LLC  
 Horizon Research Services  
**Informa Research Services, Inc.**  
 ingather research-denver  
 IntelliShop  
 Ipsos North America  
 J & S Interviewing, Inc.  
 Lodge Service - React Surveys NV/SA  
 Market Research Services  
 Marketing Endeavor  
 Ann Michaels and Associates Ltd.  
 MVP In The Field Services  
 The Mystery Guest Group  
 Mystery Shopper Pros  
 Mystique Shopper, LLC  
 National Field & Focus, Inc.  
 National Shopping Service  
 Opinions, Ltd.  
 Pacific Research Group  
 Percy & Company Research  
 Performance Insights  
 Person to Person Quality  
 Phantom Shopping  
 Premack & Ascts. of Pinellas Co., Inc.  
 PWI Research  
 Quality Check  
 QualityWorks Associates  
 Quest Marketing Group, Inc.  
 J.M. Ridgway Co., Inc.  
 Ritter Associates  
 Rothermel Research, Inc.  
 RQA, Inc.  
 Bernadette Schleis & Associates, Inc.  
 Scholl Market Research, Inc.  
 Sensus Research, Inc.  
 Serunian Investigations & Mystery Shopping  
 Service Sleuths  
 Shop'n Chek Canada  
 Sutter Marketing, Inc.  
 Taylor Research, Inc.  
 TestTrack Research, Inc.

## Merchandising Audits

A Total Resource Group  
 A.I.M. Field Service  
 AAR/All About Research  
 Amusement Advantage, LLC  
 AQ Services International, Asia  
 AQ Services International, Europe  
 AQ Services International, Japan  
 Athena Research Group  
 B. Business Solutions, Inc.  
 BAI - Asia  
 BAI - South America  
 Bare Associates International, Inc.  
 Bare Associates Int'l. Europe  
 Barnes Research, Inc.  
 Bartels Research Corp.  
 Frances Bauman Associates  
 Beyond Hello Inc.  
 Business Evaluation Services  
 Capstone Research, Inc.  
 Certified Marketing Research Services  
 Check Mark, Inc.  
 COHESIUM Research  
 Confero, Inc.  
 Connections, Inc.  
 Consumer Pulse, Inc.  
 Creative & Response Research Svcs. (Australia)  
 Customer 1st  
 Data Quest, Ltd.  
**DSG Associates, Inc.**  
 ESA Market Research Ltd.  
 Essman/Research  
 Feedback Plus, Inc.  
**Field Facts Worldwide**  
 Field Surveys & Audits, Inc.  
 First Glance  
 Galli Research Services  
 Galloway Research Services  
 GfK GRAL - ITEO  
 GfK Market Analysis Ltd.  
 GfK Turkey  
 GfK-NOP Mystery Shopping  
 Gulf View Research, LLC  
 Herron Associates, Inc.  
 Hoed Mystery Shopping  
 Horizon Research Services  
 ICC Decision Services  
**Informa Research Services, Inc.**  
 ingather research-denver  
 InGold Marketing Assistance Group, Ltd.  
 Integrated Research Associates, Inc.  
 IntelliShop  
 Ipsos North America  
 IRI Information Research Inc.  
 J & S Interviewing, Inc.  
 JustThe Facts, Inc.  
 Karla Kava, Inc.  
 Kirk Research Services, Inc.  
 Kramer Marktforschung GmbH  
 Lein/Spiegelhoff, Inc.  
 Liberty Research Services, LLC  
 Lodge Service - React Surveys NV/SA  
 M.A.T. On-Site Research  
**Maritz Research**  
 Market Alternative, Inc.  
 Market Dynamics Research Group, Inc.  
 Market Mix, Inc.  
 Market Research Services  
 Market Viewpoint  
 Marketrends, Inc.  
 Meyers Research Center  
 Ann Michaels and Associates Ltd.  
 MVP In The Field Services  
 Mystery Shopper Pros  
 Mystique Shopper, LLC  
 National Field & Focus, Inc.  
 National Shopping Service  
 Opinion Polling Service®  
 Opinions, Ltd.  
 Pacific Research Group  
**PAI-Productive Access, Inc.**  
 Pan Research, Ltd.  
 People Plus  
 Percy & Company Research  
 Performance Plus  
 Person to Person Quality  
 Phantom Shopping  
 PMR-Personal Marketing Research, Inc.  
 Premack & Ascts. of Pinellas Co., Inc.  
 Premier Service Inc.  
 Prisma Options Ltd.  
 Proforma Consulting Limited  
 PWI Research  
 Q M S  
 QualityWorks Associates  
 The Quest for Best Mystery Shoppers  
 Quest Marketing Group, Inc.  
 Quinn Marketing and Communications  
 Rast Marketing Research  
 RDAssociates, Inc.  
 Research Strategies, Inc.  
 Retail Diagnostics, Inc.  
 Reyes Research  
 J.M. Ridgway Co., Inc.  
 Ritter Associates  
 Roe Smithson & Asociados  
 Rothermel Research, Inc.  
 RQA, Inc.  
 Sandia Market Research  
 Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
 Scholl Market Research, Inc.  
 Sensus Research, Inc.  
 Service Critique  
 Service Excellence Group, Inc.  
 Service Research Corporation  
 Service Sleuths  
 Shop'n Chek Canada  
 Shop'n Chek Worldwide  
 SHOPPERS, Inc.  
 Sights On Service, Inc.  
 Societe DMS (Dynamic Marketing Svces.)  
 SPECT  
 Survey Service, Inc.  
 Sutter Marketing, Inc.  
 Taylor Research, Inc.  
 TestTrack Research, Inc.  
 Texas Shoppers Network, Inc.  
 TNS  
 TrendSource  
 Ward Research, Inc.

Liberty Research Services, LLC  
 Market Alternative, Inc.  
 Market Mix, Inc.  
 Market Research Services  
 Market Viewpoint  
 Marketrends, Inc.  
 Mintel  
 MVP In The Field Services  
 Mystique Shopper, LLC  
 National Field & Focus, Inc.  
 Opinion Polling Service®  
 Opinions, Ltd.  
 Pacific Research Group  
**PAI-Productive Access, Inc.**  
 Pammer Research, Inc.  
 People Plus  
 Percy & Company Research  
 Performance Plus  
 Phantom Shopping  
 Precision Research Inc.  
 Premack & Ascts. of Pinellas Co., Inc.  
 Premier Service Inc.  
 Professional Management Services  
 Proforma Consulting Limited  
 Q M S  
 QualityWorks Associates  
 Quest Marketing Group, Inc.  
 Quinn Marketing and Communications  
 Research Strategies, Inc.  
 Retail Diagnostics, Inc.  
 Reyes Research  
 Ritter Associates  
 Rothermel Research, Inc.  
 RQA, Inc.  
 Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
 Scholl Market Research, Inc.  
 Service Critique  
 Service Sleuths  
 Shop'n Chek Canada  
 Sights On Service, Inc.  
 Societe DMS (Dynamic Marketing Svces.)  
 Stewart International Associates  
 Texas Shoppers Network, Inc.  
 TrendSource  
 Ward Research, Inc.

## Merchandising Services

A Closer Look  
 A Customer's Point of View, Inc.  
 A Total Resource Group  
 A.I.M. Field Service  
 AAR/All About Research  
 Amusement Advantage, LLC  
 AQ Services International, Asia  
 AQ Services International, Europe  
 AQ Services International, Japan  
 Athena Research Group  
 Barnes Research, Inc.  
 Bartels Research Corp.  
 Frances Bauman Associates  
 Certified Marketing Research Services  
 Check Mark, Inc.  
 Consumer Pulse, Inc.  
 Creative & Response Research Svcs. (Australia)  
 Data Quest, Ltd.  
**DSG Associates, Inc.**  
 Field Surveys & Audits, Inc.  
 Galli Research Services  
 GfK GRAL - ITEO  
 GfK Market Analysis Ltd.  
 GfK-NOP Mystery Shopping  
 Gulf View Research, LLC  
 ICC Decision Services  
 IMAGES Market Research  
**Informa Research Services, Inc.**  
 ingather research-denver  
 InGold Marketing Assistance Group, Ltd.  
 Innotech Market Research Ltd.  
 Integrated Research Associates, Inc.  
 IntelliShop  
 Ipsos North America  
 IRI Information Research Inc.  
 JustThe Facts, Inc.  
 Karla Kava, Inc.  
 Kirk Research Services, Inc.  
 Kiyomura-Ishimoto Associates  
 Kramer Marktforschung GmbH

Online Reporting of Shops

## Online Reporting of Shops

A Closer Look  
 A Customer's Point of View, Inc.  
 A Total Resource Group  
 A.I.M. Field Service  
 AAR/All About Research  
 Amusement Advantage, LLC  
 AQ Services International, Asia  
 AQ Services International, Europe  
 AQ Services International, Japan  
 Athena Research Group  
 B. Business Solutions, Inc.  
 BAI - Asia  
 BAI - South America  
 Bare Associates International, Inc.  
 Bare Associates Int'l. Europe  
 Barnes Research, Inc.  
 Bartels Research Corp.  
 Battre Affarer/Better Business  
 Beyond Hello Inc.  
 Business Evaluation Services  
 Certified Marketing Research Services  
 Check Mark, Inc.  
 Confero, Inc.  
 Creative & Response Research Svcs. (Australia)  
 Creative Images Associates, Inc.  
 Customer 1st  
 Customer Perspectives  
 Customer Point of View  
 Customer Service Experts, Inc.  
 Data Quest, Ltd.  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
 ESA Market Research Ltd.  
 Feedback Plus, Inc.  
**Field Facts Worldwide**  
 Focus on Service, LLC

J. Franke Enterprises  
 Freeman Group  
 Galli Research Services  
 Galloway Research Services  
 GfK GRAL - ITEO  
 GfK-NOP Mystery Shopping  
 Gulf View Research, LLC  
 Gulf View Research, LLC  
 Herron Associates, Inc.  
 Hoed Mystery Shopping  
 ICC Decision Services  
**Informa Research Services, Inc.**  
 ingather research-denver  
 InGold Marketing Assistance Group, Ltd.  
 Innotech Market Research Ltd.  
 IntelliShop  
 Ipsos North America  
 J & S Interviewing, Inc.  
 Ju stThe Facts, Inc.  
 Karla Kava, Inc.  
 Kinesis  
 Kramer Marktforschung GmbH  
 Lodge Service - React Surveys NV/SA  
**Maritz Research**  
 Market Alternative, Inc.  
 Market Dynamics Research Group, Inc.  
 Market Research Services  
 Market Viewpoint  
 Marketing Endeavors  
 Marketing Systems Unlimited Corp.  
 Marketwise Consulting Group, Inc.  
 Meyers Research Center  
 Ann Michaels and Associates Ltd.  
 MVP In The Field Services  
 The Mystery Guest Group  
 Mystery Shopper Pros  
 Mystique Shopper, LLC  
 National Shopping Service  
 Opinions, Ltd.  
 Pacific Research Group  
**PAI-Productive Access, Inc.**  
 Pan Research, Ltd.  
 People Plus  
 Perception Strategies, Inc.  
 Percy & Company Research  
 Person to Person Quality  
 Phantom Shopping  
 PMR-Personal Marketing Research, Inc.  
 Premier Service Inc.  
 Q M S  
 Quality Check  
 Quality Eye  
 QualityWorks Associates  
 The Quest for Best Mystery Shoppers  
 Quest Marketing Group, Inc.  
 Quinn Marketing and Communications  
 Rast Marketing Research  
 RDAssociates, Inc.  
 Retail Diagnostics, Inc.  
 Reyes Research  
 J.M. Ridgway Co., Inc.  
 Ritter Associates  
 Rothermel Research, Inc.  
 RQA, Inc.  
 Sandia Market Research  
 Bernadette Schleis & Associates, Inc.  
 Sensus Research, Inc.  
 Service Alliance, Inc.  
 Service Excellence Group, Inc.  
 Service Impressions  
 Service Research Corporation  
 Service Sleuths  
 ServiceTRAC, LLC  
 Shop'n Chek Canada  
 Shop'n Chek Worldwide  
 Shoppers'View  
 SHOPPERS, Inc.  
 Sights On Service, Inc.  
 Signature Worldwide  
 Societe DMS (Dynamic Marketing Svces.)  
 SPECT  
 Sutter Marketing, Inc.  
 TestTrack Research, Inc.  
 Texas Shoppers Network, Inc.  
 TNS  
 TrendSource  
 Varga Market Research Services

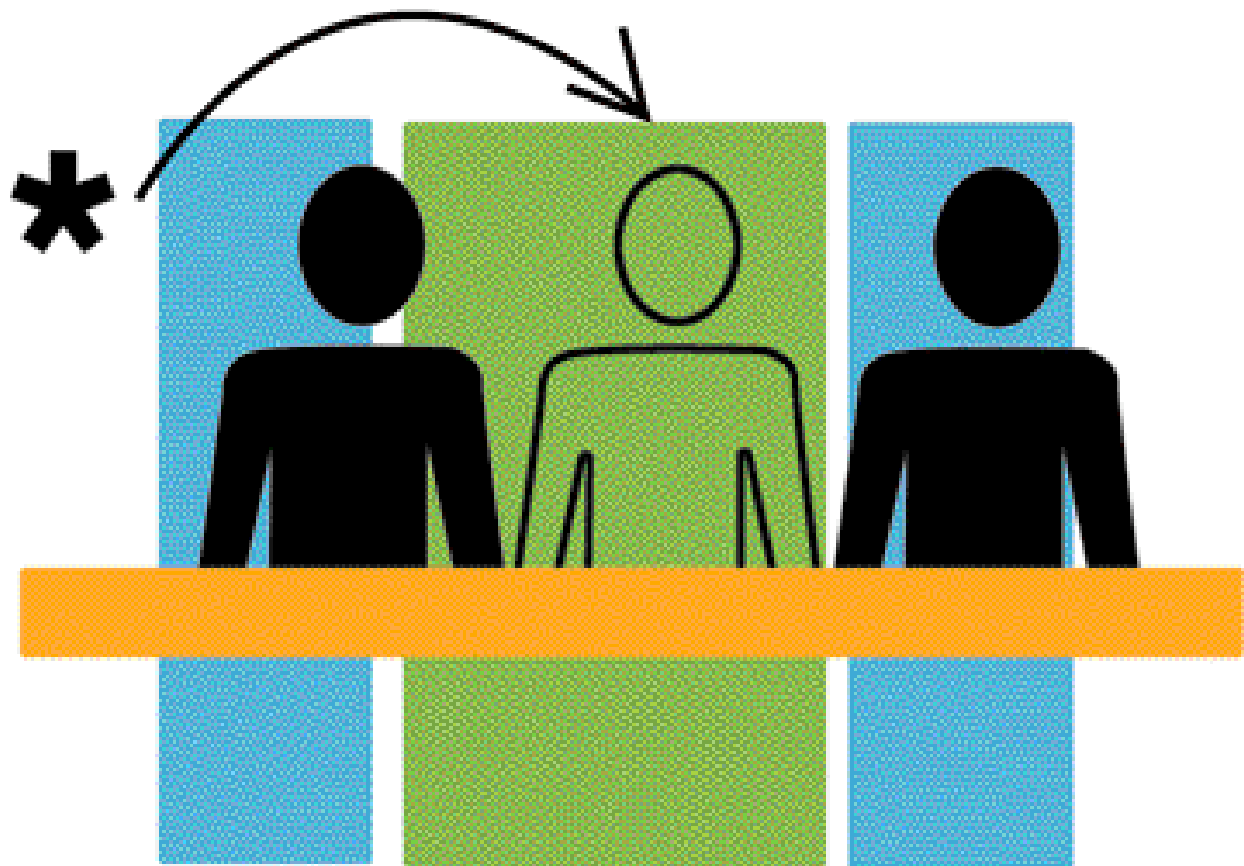
## Operational Audits

A Customer's Point of View, Inc.  
 A Total Resource Group  
 A.I.M. Field Service  
 AAR/All About Research  
 Amusement Advantage, LLC  
 AQ Services International, Asia  
 AQ Services International, Europe  
 AQ Services International, Japan  
 Athena Research Group  
 B. Business Solutions, Inc.  
 BAI - Asia  
 BAI - South America  
 Bare Associates International, Inc.  
 Bare Associates Int'l. Europe  
 Bartels Research Corp.  
 Battre Affarer/Better Business  
 Beyond Hello Inc.  
 Certified Marketing Research Services  
 Check Mark, Inc.  
 COHESIUM Research  
 Confero, Inc.  
 Consumer Pulse, Inc.  
 Convergys Customer Intelligence  
 Creative & Response Research Svcs. (Australia)  
 Customer 1st  
 Customer Perspectives  
 Customer Point of View  
 Data Quest, Ltd.  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
 ESA Market Research Ltd.  
 Excel Shopping and Consulting  
 Feedback Plus, Inc.  
**Field Facts Worldwide**  
 Field Surveys & Audits, Inc.  
 First Glance  
 Galli Research Services  
 GfK GRAL - ITEO  
 GfK Turkey  
 GfK-NOP Mystery Shopping  
 Gulf View Research, LLC  
 Gulf View Research, LLC  
 Herron Associates, Inc.  
 Horizon Research Services  
 ICC Decision Services  
**Informa Research Services, Inc.**  
 ingather research-denver  
 InGold Marketing Assistance Group, Ltd.  
 IntelliShop  
 Ipsos North America  
 Ju stThe Facts, Inc.  
 Karla Kava, Inc.  
 Kinesis  
 Kirk Research Services, Inc.  
 Kramer Marktforschung GmbH  
 Lein/Spiegelhoff, Inc.  
 Liberty Research Services, LLC  
 Lodge Service - React Surveys NV/SA  
**Maritz Research**  
 Market Mix, Inc.  
 Market Research Services  
 Market Viewpoint  
 Meyers Research Center  
 Ann Michaels and Associates Ltd.  
 MVP In The Field Services  
 The Mystery Guest Group  
 Mystery Shopper Pros  
 Mystique Shopper, LLC  
 National Shopping Service  
 Opinion Polling Service®  
 Opinions, Ltd.  
 Pacific Research Group  
**PAI-Productive Access, Inc.**  
 Pammer Research, Inc.  
 Pan Research, Ltd.  
 Percy & Company Research  
 Person to Person Quality  
 Phantom Shopping  
 Premier Service Inc.  
 Prisma Options Ltd.  
 Proforma Consulting Limited  
 PWI Research  
 Q M S  
 QualityWorks Associates  
 The Quest for Best Mystery Shoppers

Quest Marketing Group, Inc.  
 Quinn Marketing and Communications  
 RDAssociates, Inc.  
 Research Strategies, Inc.  
 Reyes Research  
 J.M. Ridgway Co., Inc.  
 Ritter Associates  
 Rothermel Research, Inc.  
 RQA, Inc.  
 Bernadette Schleis & Associates, Inc.  
 Scholl Market Research, Inc.  
 Sensus Research, Inc.  
 Service Alliance, Inc.  
 Service Impressions  
 Service Research Corporation  
 Service Sleuths  
 Shop'n Chek Canada  
 Shop'n Chek Worldwide  
 Shoppers'View  
 SHOPPERS, Inc.  
 Sights On Service, Inc.  
 Signature Worldwide  
 Societe DMS (Dynamic Marketing Svces.)  
 SPECT  
 Sutter Marketing, Inc.  
 TestTrack Research, Inc.  
 TNS  
 TrendSource  
 Video Eyes LLC  
 Ward Research, Inc.

## Price Audits

A Total Resource Group  
 A.I.M. Field Service  
 AAR/All About Research  
 Amusement Advantage, LLC  
 AQ Services International, Asia  
 AQ Services International, Europe  
 AQ Services International, Japan  
 Athena Research Group  
 B. Business Solutions, Inc.  
 BAI - Asia  
 BAI - South America  
 Bare Associates International, Inc.  
 Bare Associates Int'l. Europe  
 Barnes Research, Inc.  
 Bartels Research Corp.  
 Battre Affarer/Better Business  
 Frances Bauman Associates  
 Beyond Hello Inc.  
 Business Evaluation Services  
 Capstone Research, Inc.  
 Certified Marketing Research Services  
 Check Mark, Inc.  
 COHESIUM Research  
 Confero, Inc.  
 Connections, Inc.  
 Consumer Pulse, Inc.  
 Creative & Response Research Svcs. (Australia)  
 Customer 1st  
 Data Quest, Ltd.  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
 ESA Market Research Ltd.  
 Essman/Research  
 Excel Shopping and Consulting  
 Feedback Plus, Inc.  
**Field Facts Worldwide**  
 Field Surveys & Audits, Inc.  
 First Glance  
 Galli Research Services  
 Galloway Research Services  
 GfK GRAL - ITEO  
 GfK Market Analysis Ltd.  
 GfK Turkey  
 GfK-NOP Mystery Shopping  
 Gulf View Research, LLC  
 Herron Associates, Inc.  
 Horizon Research Services  
 ICC Decision Services  
**Informa Research Services, Inc.**  
 ingather research-denver  
 InGold Marketing Assistance Group, Ltd.  
 IntelliShop  
 Ipsos North America  
 Ju stThe Facts, Inc.  
 Karla Kava, Inc.  
 Kinesis  
 Kirk Research Services, Inc.  
 Kramer Marktforschung GmbH  
 Lein/Spiegelhoff, Inc.  
 Liberty Research Services, LLC  
 Lodge Service - React Surveys NV/SA  
**Maritz Research**  
 Market Alternative, Inc.  
 Market Mix, Inc.  
 Market Research Services  
 Market Viewpoint  
 Meyers Research Center  
 Ann Michaels and Associates Ltd.  
 MVP In The Field Services  
 The Mystery Guest Group  
 Mystery Shopper Pros  
 Mystique Shopper, LLC  
 National Shopping Service  
 Opinion Polling Service®  
 Opinions, Ltd.  
 Pacific Research Group  
**PAI-Productive Access, Inc.**  
 Pammer Research, Inc.  
 Pan Research, Ltd.  
 Percy & Company Research  
 Person to Person Quality  
 Phantom Shopping  
 Premier Service Inc.  
 Prisma Options Ltd.  
 Proforma Consulting Limited  
 PWI Research  
 Q M S  
 QualityWorks Associates  
 The Quest for Best Mystery Shoppers  
 Quest Marketing Group, Inc.  
 Quinn Marketing and Communications  
 RDAssociates, Inc.  
 Research Strategies, Inc.  
 Retail Diagnostics, Inc.  
 Reyes Research  
 J.M. Ridgway Co., Inc.  
 Ritter Associates  
 Rothermel Research, Inc.  
 RQA, Inc.  
 Sandia Market Research  
 Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
 Scholl Market Research, Inc.  
 Sensus Research, Inc.  
 Service Alliance, Inc.  
 Service Excellence Group, Inc.  
 Service Impressions  
 Service Sleuths  
 Shop'n Chek Canada  
 Shop'n Chek Worldwide  
 Shoppers'View  
 SHOPPERS, Inc.  
 Sights On Service, Inc.  
 Societe DMS (Dynamic Marketing Svces.)  
 SPECT  
 Sutter Marketing, Inc.  
 Taylor Research, Inc.  
 TestTrack Research, Inc.  
 TrendSource  
 Venture Research Corporation  
 Ward Research, Inc.



## \* What's A Focus Group Without a Moderator?

Our May issue included our first annual directory of focus group moderators. It contained more than 1,000 moderators at over 800 firms.

If you no longer have your May issue, don't worry – a fully searchable version of the directory is available on our Web site at [www.quirks.com](http://www.quirks.com).

**QUIRK'S**  
Marketing Research Review  
[www.quirks.com](http://www.quirks.com)

## Geographic cross index

### USA-East Coast

A Closer Look  
A Customer's Point of View, Inc.  
A Total Resource Group  
Amusement Advantage, LLC  
Any Small Town Market Research  
Athena Research Group  
B. Business Solutions, Inc.  
Bare Associates International, Inc.  
Frances Bauman Associates  
BestMark  
Beyond Hello Inc.  
BMA Mystery Shopping  
Business Evaluation Services  
Certified Marketing Research Services  
Check Mark, Inc.  
Confero, Inc.  
Consumer Pulse, Inc.  
Convergys Customer Intelligence  
Corporate Research International  
Creative Images Associates, Inc.  
Cross Financial Group  
Customer 1st  
Customer Perspectives  
Customer Point of View  
Customer Service Experts, Inc.  
Customer Service Profiles  
Data Quest, Ltd.  
Devon Hill Associate, LLC  
Dominion Focus Group, Inc.  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
Excel Shopping and Consulting  
Feedback Plus, Inc.  
First Glance  
Focus on Service, LLC  
J. Franke Enterprises  
Freeman Group  
GfK-NOP Mystery Shopping  
Granite State Marketing Research, Inc.  
ICC Decision Services  
**Informa Research Services, Inc.**  
The Insight Works, Inc.  
Integrated Research Associates, Inc.  
IntelliShop  
International Service Check  
Ipsos North America  
Just The Facts, Inc.  
Kinesis  
Liberty Research Services, LLC  
**Maritz Research**  
Market Viewpoint  
Marketing Endeavors  
Marketing Solutions Corporation  
Marketing Systems Unlimited Corp.  
Marketrends, Inc.  
**McMillion Research Service**  
Meyers Research Center  
Ann Michaels and Associates Ltd.  
Mintel  
The Mystery Guest Group  
Mystery Shopper Pros  
Mystique Shopper, LLC  
National Field & Focus, Inc.  
National Shopping Service  
National Shopping Service Network, LLC  
Opinion Polling Service®  
Opinions, Ltd.  
Pacific Research Group  
**PAI-Productive Access, Inc.**  
Pat Henry Market Research, Inc.  
Peak Performance Mystery Shopping  
Perception Strategies, Inc.  
The Performance Group, Inc.

Performance Plus  
Person to Person Quality  
Precision Research, Inc.  
Premier Service Inc.  
Q M S  
Quality Check  
QualityWorks Associates  
The Quest for Best Mystery Shoppers  
Quest Marketing Group, Inc.  
Quinn Marketing and Communications  
Rapid Research  
Rast Marketing Research  
RDAssociates, Inc.  
Reflections Mystery Shopping  
Retail Diagnostics, Inc.  
J.M. Ridgway Co., Inc.  
Ritter Associates  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
Scholl Market Research, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Sensus Research, Inc.  
Serunian Investigations Service Alliance, Inc.  
Service Excellence Group, Inc.  
Service Impressions  
Service Industry Rsch. Systems, Inc. (SIRS)  
Service Intelligence Inc., USA  
Service Research Corporation  
Service Sleuths  
ServiceTRAC, LLC  
Shop'n Chek Worldwide  
Shoppers' View  
SHOPPERS, Inc.  
Sights On Service, Inc.  
Signature Worldwide  
Stackpole & Associates Inc.  
Survey Service, Inc.  
Sutter Marketing, Inc.  
Test Track Research, Inc.  
Texas Shoppers Network, Inc.  
TNS  
TrendSource  
Video Eyes LLC

### USA-South

A Closer Look  
A Customer's Point of View, Inc.  
A Total Resource Group  
A.I.M. Field Service  
Advantage Business Services  
Amusement Advantage, LLC  
Any Small Town Market Research  
Athena Research Group  
B. Business Solutions, Inc.  
Bare Associates International, Inc.  
BestMark  
Beyond Hello Inc.  
BMA Mystery Shopping  
Business Evaluation Services  
Certified Marketing Research Services  
Check Mark, Inc.  
Confero, Inc.  
Consumer Pulse, Inc.  
Convergys Customer Intelligence  
Corporate Research International  
Creative Images Associates, Inc.  
Cross Financial Group  
Customer 1st  
Customer Perspectives  
Customer Point of View  
Customer Service Experts, Inc.  
Customer Service Profiles  
Data Quest, Ltd.  
Devon Hill Associate, LLC  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
Excel Shopping and Consulting  
Feedback Plus, Inc.  
First Glance  
Focus on Service, LLC  
J. Franke Enterprises  
Freeman Group  
GfK-NOP Mystery Shopping  
Graham & Associates, Inc.

Gulf View Research, LLC  
ICC Decision Services  
IMAGES Market Research  
**Informa Research Services, Inc.**  
The Insight Works, Inc.  
Integrated Research Associates, Inc.  
IntelliShop  
International Service Check  
Ipsos North America  
Just The Facts, Inc.  
Kinesis  
Kirk Research Services, Inc.  
**Maritz Research**  
Market Dynamics Research Group, Inc.  
Market Viewpoint  
Marketing Endeavors  
Marketing Solutions Corporation  
Marketing Systems Unlimited Corp.  
Marketrends, Inc.  
**McMillion Research Service**  
Meyers Research Center  
Ann Michaels and Associates Ltd.  
Mintel  
MVP In The Field Services  
The Mystery Guest Group  
Mystery Shopper Pros  
Mystery Shoppers, Inc.  
Mystique Shopper, LLC  
National Shopping Service  
National Shopping Service Network, LLC  
New South Research  
Opinion Polling Service®  
Pacific Research Group  
**PAI-Productive Access, Inc.**  
Pat Henry Market Research, Inc.  
Peak Performance Mystery Shopping  
People Plus  
Perception Strategies, Inc.  
Percy & Company Research  
The Performance Group, Inc.  
Person to Person Quality  
Precision Research, Inc.  
Premack & Ascts. of Pinellas Co., Inc.  
Premier Service Inc.  
PWI Research  
Quality Check  
QualityWorks Associates  
The Quest for Best Mystery Shoppers  
Quinn Marketing and Communications  
RDAssociates, Inc.  
Reflections Mystery Shopping  
Research Inc.  
Research Strategies, Inc.  
Retail Diagnostics, Inc.  
J.M. Ridgway Co., Inc.  
Ritter Associates  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
Scholl Market Research, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Sensus Research, Inc.  
Service Alliance, Inc.  
Service Excellence Group, Inc.  
Service Impressions  
Service Industry Rsch. Systems, Inc. (SIRS)  
Service Intelligence Inc., USA  
Service Research Corporation  
Service Sleuths  
ServiceTRAC, LLC  
The Shadow Shopper of Georgia, Inc.  
Shop'n Chek Worldwide  
Shoppers' View  
SHOPPERS, Inc.  
Sights On Service, Inc.  
Signature Worldwide  
South East Market Research  
Stackpole & Associates Inc.  
Survey Service, Inc.  
Sutter Marketing, Inc.  
Test Track Research, Inc.  
Texas Shoppers Network, Inc.  
TNS  
TrendSource  
Varga Market Research Services

Video Eyes LLC

### USA-Midwest

A Closer Look  
A Customer's Point of View, Inc.  
A Total Resource Group  
AAR/All About Research  
Amusement Advantage, LLC  
Any Small Town Market Research  
Athena Research Group  
B. Business Solutions, Inc.  
Bare Associates International, Inc.  
Barnes Research, Inc.  
BestMark  
Beyond Hello Inc.  
BMA Mystery Shopping  
Business Evaluation Services  
Certified Marketing Research Services  
Check Mark, Inc.  
Confero, Inc.  
Consumer Pulse, Inc.  
Convergys Customer Intelligence  
Corporate Research International  
Creative Images Associates, Inc.  
Cross Financial Group  
Customer 1st  
Customer Perspectives  
Customer Point of View  
Customer Service Experts, Inc.  
Customer Service Profiles  
Data Quest, Ltd.  
Devon Hill Associate, LLC  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
Essman Research  
Excel Shopping and Consulting  
Feedback Plus, Inc.  
Field Surveys & Audits, Inc.  
First Glance  
Focus on Service, LLC  
J. Franke Enterprises  
Freeman Group  
Galli Research Services  
GfK-NOP Mystery Shopping  
Herron Associates, Inc.  
Horizon Research Services  
ICC Decision Services  
Indiana Research Service, Inc.  
**Informa Research Services, Inc.**  
ingather research-denver  
InGold Marketing Assistance Group, Ltd.  
The Insight Works, Inc.  
Integrated Research Associates, Inc.  
IntelliShop  
International Service Check  
Ipsos North America  
Just The Facts, Inc.  
Kinesis  
Lein/Spiegelhoff, Inc.  
**Maritz Research**  
Market Research Services  
Market Viewpoint  
Marketing Endeavors  
Marketing Solutions Corporation  
Marketing Systems Unlimited Corp.  
Marketwise Consulting Group, Inc.  
Meyers Research Center  
Ann Michaels and Associates Ltd.  
Mintel  
The MSR Group  
The Mystery Guest Group  
Mystery Shopper Pros  
Mystique Shopper, LLC  
National Shopping Service  
National Shopping Service Network, LLC  
Opinions, Ltd.  
Pacific Research Group  
**PAI-Productive Access, Inc.**  
Pammer Research, Inc.  
Pat Henry Market Research, Inc.  
Peak Performance Mystery Shopping  
People Plus  
Perception Strategies, Inc.  
The Performance Group, Inc.  
Person to Person Quality  
PMR-Personal Marketing Research, Inc.



Precision Research, Inc.  
Premier Service Inc.  
Professional Management Services  
PRYBYL Group, Inc.  
Quality Check  
QualityWorks Associates  
The Quest for Best Mystery Shoppers  
Quinn Marketing and Communications  
RDAssociates, Inc.  
Reflections Mystery Shopping  
Retail Diagnostics, Inc.  
J.M. Ridgway Co., Inc.  
Ritter Associates  
Rothermel Research, Inc.  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
Scholl Market Research, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Sensus Research, Inc.  
Service Alliance, Inc.  
Service Excellence Group, Inc.  
Service Impressions  
Service Industry Rsch. Systems, Inc. (SIRS)  
Service Intelligence Inc., USA  
Service Research Corporation  
Service Sleuths  
ServiceTRAC, LLC  
Shop'n Chek Worldwide  
Shoppers' View  
SHOPPERS, Inc.  
Signature Worldwide  
Stackpole & Associates Inc.  
Stewart International Associates  
Survey Service, Inc.  
Sutter Marketing, Inc.  
Test Track Research, Inc.  
Texas Shoppers Network, Inc.  
TNS  
TrendSource  
Venture Research Corporation  
Video Eyes LLC

## USA-Mountain

A Closer Look  
A Customer's Point of View, Inc.  
A Total Resource Group  
Amusement Advantage, LLC  
Any Small Town Market Research  
Athena Research Group  
B. Business Solutions, Inc.  
Bare Associates International, Inc.  
BestMark  
Beyond Hello Inc.  
BMA Mystery Shopping  
Business Evaluation Services  
Certified Marketing Research Services  
Check Mark, Inc.  
Confero, Inc.  
Consumer Pulse, Inc.  
Convergys Customer Intelligence  
Corporate Research International  
Creative Images Associates, Inc.  
Cross Financial Group  
Customer 1st  
Customer Perspectives  
Customer Point of View  
Customer Service Experts, Inc.  
Customer Service Profiles  
Data Quest, Ltd.  
Devon Hill Associate, LLC  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
Excel Shopping and Consulting  
Feedback Plus, Inc.  
First Glance  
Focus on Service, LLC  
J. Franke Enterprises  
Freeman Group  
GfK-NOP Mystery Shopping  
ICC Decision Services  
**Informa Research Services, Inc.**  
ingather research-denver  
The Insight Works, Inc.  
Integrated Research Associates, Inc.

IntelliShop  
International Service Check  
Ipsos North America  
IRI Information Research Inc.  
Just The Facts, Inc.  
Kinesis  
**Maritz Research**  
Market Viewpoint  
Marketing Endeavors  
Marketing Solutions Corporation  
Marketing Systems Unlimited Corp.  
Meyers Research Center  
Ann Michaels and Associates Ltd.  
Mintel  
The Mystery Guest Group  
Mystery Shopper Pros  
Mystique Shopper, LLC  
National Shopping Service  
National Shopping Service Network, LLC  
Opinion Polling Service®  
Pacific Research Group  
**PAI-Productive Access, Inc.**  
Pat Henry Market Research, Inc.  
Peak Performance Mystery Shopping  
People Plus  
Perception Strategies, Inc.  
The Performance Group, Inc.  
Person to Person Quality  
Precision Research, Inc.  
Premier Service Inc.  
Quality Check  
QualityWorks Associates  
The Quest for Best Mystery Shoppers  
Quinn Marketing and Communications  
RDAssociates, Inc.  
Reflections Mystery Shopping  
Retail Diagnostics, Inc.  
J.M. Ridgway Co., Inc.  
Ritter Associates  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
Scholl Market Research, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Sensus Research, Inc.  
Service Alliance, Inc.  
Service Excellence Group, Inc.  
Service Impressions  
Service Industry Rsch. Systems, Inc. (SIRS)  
Service Intelligence Inc., USA  
Service Research Corporation  
Service Sleuths  
ServiceTRAC, LLC  
Shop'n Chek Worldwide  
Shoppers' View  
SHOPPERS, Inc.  
Signature Worldwide  
Stackpole & Associates Inc.  
Survey Service, Inc.  
Sutter Marketing, Inc.  
Test Track Research, Inc.  
Texas Shoppers Network, Inc.  
TNS  
TrendSource  
Video Eyes LLC

## USA-Southwest

A Closer Look  
A Customer's Point of View, Inc.  
A Total Resource Group  
Amusement Advantage, LLC  
Any Small Town Market Research  
Ask Arizona  
Athena Research Group  
B. Business Solutions, Inc.  
Bare Associates International, Inc.  
BestMark  
Beyond Hello Inc.  
BMA Mystery Shopping  
Business Evaluation Services  
Certified Marketing Research Services  
Check Mark, Inc.  
Confero, Inc.  
Connections, Inc.  
Convergys Customer Intelligence  
Corporate Research International

Creative Images Associates, Inc.  
Cross Financial Group  
Customer 1st  
Customer Perspectives  
Customer Point of View  
Customer Service Experts, Inc.  
Customer Service Profiles  
Data Quest, Ltd.  
Devon Hill Associate, LLC  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
Excel Shopping and Consulting  
Feedback Plus, Inc.  
First Glance  
Focus on Service, LLC  
J. Franke Enterprises  
Freeman Group  
Galloway Research Services  
GfK-NOP Mystery Shopping  
ICC Decision Services  
**Informa Research Services, Inc.**  
ingather research-denver  
The Insight Works, Inc.  
Integrated Research Associates, Inc.  
IntelliShop  
International Service Check  
Ipsos North America  
Just The Facts, Inc.  
Kinesis  
M.A.T. On-Site Research  
**Maritz Research**  
Market Research Services  
Market Viewpoint  
Marketing Endeavors  
Marketing Solutions Corporation  
Marketing Systems Unlimited Corp.  
Meyers Research Center  
Ann Michaels and Associates Ltd.  
Mintel  
The Mystery Guest Group  
Mystery Shopper Pros  
Mystique Shopper, LLC  
National Shopping Service  
National Shopping Service Network, LLC  
Opinion Polling Service®  
Pacific Research Group  
**PAI-Productive Access, Inc.**  
Pat Henry Market Research, Inc.  
Peak Performance Mystery Shopping  
Perception Strategies, Inc.  
The Performance Group, Inc.  
Performance Insights  
Person to Person Quality  
Precision Research Inc.  
Precision Research, Inc.  
Premier Service Inc.  
Quality Check  
QualityWorks Associates  
The Quest for Best Mystery Shoppers  
Quinn Marketing and Communications  
RDAssociates, Inc.  
Reflections Mystery Shopping  
Retail Diagnostics, Inc.  
Reyes Research  
J.M. Ridgway Co., Inc.  
Ritter Associates  
Roe Smithson & Asociados  
RQA, Inc.  
Sandia Market Research  
Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
Scholl Market Research, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Sensus Research, Inc.  
Service Alliance, Inc.  
Service Excellence Group, Inc.  
Service Impressions  
Service Industry Rsch. Systems, Inc. (SIRS)  
Service Intelligence Inc., USA  
Service Research Corporation  
Service Sleuths  
ServiceTRAC, LLC  
Shop'n Chek Worldwide  
Shoppers' View  
SHOPPERS, Inc.  
Sights On Service, Inc.  
Signature Worldwide  
Stackpole & Associates Inc.  
Survey Service, Inc.  
Sutter Marketing, Inc.  
Test Track Research, Inc.

Texas Shoppers Network, Inc.  
TNS  
TrendSource  
Video Eyes LLC  
WestGroup Research

## USA-West Coast

A Closer Look  
A Customer's Point of View, Inc.  
A Total Resource Group  
Amusement Advantage, LLC  
Any Small Town Market Research  
Athena Research Group  
B. Business Solutions, Inc.  
Bare Associates International, Inc.  
Bartels Research Corp.  
BestMark  
Beyond Hello Inc.  
BMA Mystery Shopping  
Business Evaluation Services  
Certified Marketing Research Services  
Check Mark, Inc.  
Confero, Inc.  
Consumer Pulse, Inc.  
Convergys Customer Intelligence  
Corporate Research International  
Creative Images Associates, Inc.  
Cross Financial Group  
Customer 1st  
Customer Perspectives  
Customer Point of View  
Customer Service Experts, Inc.  
Customer Service Profiles  
Data Quest, Ltd.  
Devon Hill Associate, LLC  
**DSG Associates, Inc.**  
**Dynamic Advantage, Inc.**  
Excel Shopping and Consulting  
Feedback Plus, Inc.  
First Glance  
Focus on Service, LLC  
J. Franke Enterprises  
Freeman Group  
GfK-NOP Mystery Shopping  
ICC Decision Services  
**Informa Research Services, Inc.**  
The Insight Works, Inc.  
Integrated Research Associates, Inc.  
IntelliShop  
International Service Check  
Ipsos North America  
Just The Facts, Inc.  
Karla Kava, Inc.  
Kinesis  
Kijomura-Ishimoto Associates  
**Maritz Research**  
Market Alternative, Inc.  
Market Viewpoint  
Marketing Endeavors  
Marketing Solutions Corporation  
Marketing Systems Unlimited Corp.  
Meyers Research Center  
Ann Michaels and Associates Ltd.  
Mintel  
The Mystery Guest Group  
Mystery Shopper Pros  
Mystique Shopper, LLC  
National Shopping Service  
National Shopping Service Network, LLC  
Pacific Research Group  
**PAI-Productive Access, Inc.**  
Pat Henry Market Research, Inc.  
Peak Performance Mystery Shopping  
Perception Strategies, Inc.  
The Performance Group, Inc.  
Person to Person Quality  
Precision Research, Inc.  
Premier Service Inc.  
Quality Check  
QualityWorks Associates  
The Quest for Best Mystery Shoppers  
Quinn Marketing and Communications  
RDAssociates, Inc.  
Reflections Mystery Shopping  
Retail Diagnostics, Inc.  
Ritter Associates  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
**Schlesinger Associates, Inc.**  
Scholl Market Research, Inc.

Second To None, Inc.  
Sensors Quality Management, Inc.  
Sensus Research, Inc.  
Service Alliance, Inc.  
Service Excellence Group, Inc.  
Service Impressions  
Service Industry Rsch. Systems, Inc. (SIRS)  
Service Intelligence Inc., USA  
Service Research Corporation  
Service Sleuths  
ServiceTRAC, LLC  
Shop'n Chek Worldwide  
Shoppers'View  
SHOPPERS, Inc.  
Sights On Service, Inc.  
Signature Worldwide  
Stackpole & Associates Inc.  
Survey Service, Inc.  
Sutter Marketing, Inc.  
Taylor Research, Inc.  
TestTrack Research, Inc.  
Texas Shoppers Network, Inc.  
TNS  
TrendSource  
Video Eyes LLC

## Canada

A Closer Look  
Amusement Advantage, LLC  
B. Business Solutions, Inc.  
Bare Associates International, Inc.  
Beyond Hello Inc.  
Business Evaluation Services  
Certified Marketing Research Services  
Check Mark, Inc.  
Corporate Research International  
Creative Images Associates, Inc.  
Customer 1st  
Customer Foresight Group, Limited  
Customer Perspectives  
Customer Service Experts, Inc.  
**DSG Associates, Inc.**  
Freeman Group  
GfK-NOP Mystery Shopping  
ICC Decision Services  
**Informa Research Services, Inc.**  
Innotech Market Research Ltd.  
IntelliShop  
International Service Check  
Ipsos North America  
JustThe Facts, Inc.  
Kinesix  
Market Viewpoint  
Marketing Solutions Corporation  
Meyers Research Center  
Ann Michaels and Associates Ltd.  
Mintel  
The Mystery Guest Group  
Mystique Shopper, LLC  
National Shopping Service  
National Shopping Service Network, LLC  
Pacific Research Group  
**PAI-Productive Access, Inc.**  
Premier Service Inc.  
Proforma Consulting Limited  
QualityWorks Associates  
The Quest for Best Mystery Shoppers  
Quinn Marketing and Communications  
RDAssociates, Inc.  
Reflections Mystery Shopping  
J.M. Ridgway Co., Inc.  
Ritter Associates  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Sensus Research, Inc.  
Service Excellence Group, Inc.  
Service Impressions  
Service Intelligence Inc.  
Service Research Corporation  
Service Sleuths  
ServiceTRAC, LLC  
Shop'n Chek Canada  
Shop'n Chek Worldwide  
Shoppers'View  
SHOPPERS, Inc.

Sights On Service, Inc.  
Signature Worldwide  
Sutter Marketing, Inc.  
Texas Shoppers Network, Inc.  
TNS  
TrendSource  
Video Eyes LLC

## Mexico

BAI - South America  
Bare Associates International, Inc.  
Bare Associates Int'l. Europe  
Certified Marketing Research Services  
Check Mark, Inc.  
Corporate Research International  
Customer Service Experts, Inc.  
**DSG Associates, Inc.**  
Freeman Group  
GfK-NOP Mystery Shopping  
**Informa Research Services, Inc.**  
IntelliShop  
International Service Check  
Ipsos North America  
JustThe Facts, Inc.  
**Maritz Research**  
Mintel  
National Shopping Service  
Pacific Research Group  
Premier Service Inc.  
QualityWorks Associates  
Reflections Mystery Shopping  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Sensus Research, Inc.  
Service Critique  
Shop'n Chek Worldwide  
TNS  
Video Eyes LLC

## Central & South America

BAI - South America  
Bare Associates International, Inc.  
Bare Associates Int'l. Europe  
Certified Marketing Research Services  
Check Mark, Inc.  
Corporate Research International  
**DSG Associates, Inc.**  
**Field Facts Worldwide**  
Freeman Group  
GfK-NOP Mystery Shopping  
**Informa Research Services, Inc.**  
IntelliShop  
International Service Check  
Ipsos North America  
JustThe Facts, Inc.  
Mintel  
National Shopping Service  
Pacific Research Group  
QualityWorks Associates  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Service Critique  
Service Sleuths  
Shop'n Chek Worldwide  
TNS

## Caribbean

BAI - South America  
Bare Associates International, Inc.  
Bare Associates Int'l. Europe  
Beyond Hello Inc.  
Certified Marketing Research Services  
Check Mark, Inc.  
Corporate Research International  
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International Service Check  
Ipsos North America  
Mintel  
National Shopping Service  
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## Asia

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Bare Associates International, Inc.  
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Check Mark, Inc.  
Corporate Research International  
**Dynamic Advantage, Inc.**  
**Field Facts Worldwide**  
Freeman Group  
GfK-NOP Mystery Shopping  
**Informa Research Services, Inc.**  
IntelliShop  
International Service Check  
Ipsos North America  
JustThe Facts, Inc.  
Market Viewpoint  
Marketing Solutions Corporation  
Mintel  
National Shopping Service  
Pacific Research Group  
QualityWorks Associates  
RQA, Inc.  
Bernadette Schleis & Associates, Inc.  
Second To None, Inc.  
Sensors Quality Management, Inc.  
Shop'n Chek Worldwide  
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Bare Associates International, Inc.  
Bare Associates Int'l. Europe  
Check Mark, Inc.  
Corporate Research International  
**Field Facts Worldwide**  
Freeman Group  
GfK-NOP Mystery Shopping  
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# 2005 Quirk's Story Index

## Case Histories

### January

**Online research: Broad appeal** – Respondents react well to broadband-based research approach

**Mystery shopping: Delivering results** – Mystery shopping improves the customer experience for Postal Service patrons

### March

**Business-to-business research: Work your plan** – Pre-research planning helps Texas tech firm put findings in motion

### April

**Advertising research: Emotion detector** – An online survey instrument gives American Express valuable insights for developing its advertising and marketing programs

### May

**Qualitative research: Shedding new light on an old flame** – SC Johnson uses ethnography to find fresh ideas for candle products

**Qualitative research: Evaluating the impact of a great idea** – Comprehensive research program helps the Propane Education & Research Council expand the propane market

### October

**Customer satisfaction research: It's automated and controlled** – Real-time customer feedback system drives enterprise-wide action at Honeywell

### November

**International research: A storied destination** – Scotland's tourism agency revamps ad campaign to attract European visitors

### December

**Qualitative research: A global consensus** – IT firm seeks company-wide acceptance of findings from international qualitative project

## Technique Discussions

### January

**Online research: Taking a page from the offline world** – A prescription for testing multi-page print ads online

**Online research: There are benefits to both** – A comparison of traditional and online focus groups

**International research: Rely on your training** – There's no need to fear international research projects

**Online research: Demographic and online survey response rates** – A study of non-response patterns

**Online research: Avoid the Field of Dreams fallacy** – Putting your survey

online won't bring automatic success

**Mystery shopping: Beyond mere measurement** – Retailers use mystery shopping to improve, not just measure, customer service

**Mystery shopping: 21st century mystery shopping** – New technologies give technique a boost

### February

**Special markets - seniors: Focus on their needs** – How to make your groups senior-friendly

**Special markets - disabled: Make the process open to all** – Bringing Web surveys into compliance with the Americans with Disabilities Act

**Special markets - GLBT: Changing times?** Gay market trends and the 2004 election

**Special markets - Boomers: Say hello to LOHAS** – Growing market segment focuses on health and sustainability

**Special markets - women: Capture the power of the purse** – Tailor your research to match women's requirements

**Special markets - teens: Kid-tested, mother-approved** – Food marketing to tweens and teens

**Decision-making research: Decide and buy** – Consumer decision-making models, strategies and theories, oh my!

### March

**Business-to-business research: Worth the effort** – Guidelines for building a successful b-t-b panel

**Business-to-business research: To last a lifetime** – Developing a customer value model to maximize profitability

**Marketing analysis research: A new horizon for marketing accountability** – An examination of marketing investment management

### April

**Advertising research: Pre-post vs. post-only studies** – Measuring 'lift' is changing the balance

**Advertising research: Virtual consumption** – How ads can make your brand their brand

**Advertising research: The visual impact of award-winning ads** – Creative ads can work if they're done right

**Advertising research: Play better offense and defense** – Measure marketing and advertising effectiveness with response tracking

**Customer relationship research: Moving beyond satisfaction** – A look at customer relationships

### May

**Qualitative research: When you're not a pet rock** – Six qualitative research sins

**Qualitative research: Online in-depth proves its promise** – Respondents stay active, engaged

**Qualitative research: Should you choose an internal or an external moderator?** – A look at the pros and cons

**Qualitative research: Not quite everybody, it seems** – Early focus group findings nearly spelled the end of Everybody Loves Raymond

**Quantitative research: Ask the right questions** – Proper questionnaire writing for optimal results in research

### June

**Health care research: Multiple methods for multiple specialties** – Targeting physicians using online methodologies

**Health care research: Analyzing an empowered patient** – A look at consumer-driven health care informatics

**Health care research: A deeper examination** – Behavioral science techniques in medical marketing research

**Health care research: Seeing patients as customers** – A guide to developing a CRM process in the health care setting

**Health care research: Many questions, not so many answers** – Respondents in women's health study cite doctor/patient disconnect

**Ethnic research: Your language, their language, or both?** – A new perspective on Hispanic media planning

**Ethnic research: Bilingual, bicultural and more** – A primer on Hispanic teens

### July/August

**Online research: Lingering differences** – After more than a decade of Web surveys, online findings still depart from phone survey results

**Online research: Feeling insecure about your image?** – A look at preventing the copying of visual stimuli in online research

**Online research: Strange bedfellows or friendly neighbors?** – Venture capital and market research

**Online research: A communal effort** – Online communities require ongoing care and attention

**Online research: Pick your peaks** – How to improve the accuracy of Internet ad tracking

**Online research: Caution: global forces at work** – Gigatrends are shaping the use of online research

**Online research: Conserve your resources** – Reaching IT professionals through online surveys

**Online research: Maximizing respondent cooperation** – Ten tips for better survey design

**Online research: You say evolution, I say devolution** – Has data collection improved or gotten worse?



## October

**Customer satisfaction research: Voice lessons** - *Implementing an integrated voice-of-the-customer architecture*

**Customer satisfaction research: You have to measure it to avoid it** - *Dissatisfaction surveys may be better than satisfaction surveys*

**Customer satisfaction research: What you don't know can hurt you** - *Customer satisfaction research gives voice to the silent majority*

**Customer satisfaction research: Less may be more** - *Conducting an effective customer satisfaction program*

**Customer satisfaction research: Beyond mere measurement** - *Achieve satisfaction through customer experience management*

**Market analysis research: A recommended approach** - *Using choice grids to understand your market and the forces that shape it*

## November

**International research: An enriching process** - *In-situ research in Latin America*

**International research: Success in any language** - *Tips for buying translation services*

**International research: For best results, plan ahead** - *Managing international research*

**International research: Q&A: Research in Mexico**

**Panel research: You may get more than you pay for** - *Want better product ideas? Try smart incentives*

**Panel research: Managing for maximum return** - *How to nurture your online panel*

**Panel research: Making steady progress** - *Online panels improving, evolving*

**Panel research: Your survey, our needs** - *Panel respondents tell what gets them to participate*

**The business of research: Is MRO a friend or foe?** *Like it or not, outsourcing of research services is here to stay*

## December

**Qualitative research: Watch, listen and learn** - *Using ethnography to spark new product ideas*

**Qualitative research: How to be a better client** - *15 keys to a successful relationship with your qualitative researcher*

**Qualitative research: Find out if success is in the cards** - *A qualitative approach to consumer-based concept development*

**Qualitative research: The metamorphosis of a qualitative researcher** - *Part I: Do you have the knack?*

**Qualitative research: Perceptions and realities** - *Thoughts on the role of video and ethnography in marketing research*

**Qualitative research: Getting emotional** - *Did the product stop pushing consumers' emotional buttons?*

## Data Use

### January

**Getting your money's worth with virtual targeting**

### February

**Darwinism and data**

### March

**Another way to assess satisfaction drivers**

### April

**Unearthing TURF**

### June

**Forecasting new product market potential in the pharmaceutical industry**

### October

**Choice modeling analytics - the benefits of new methods**

### December

**Using the analytical hierarchy process**

## Qualitatively Speaking

### January

**Moderating and motherhood: strategies for success**

### February

**Involving kids in the creative process is the name of the game**

### March

**Is gender an issue for the ethnographic researcher?**

### May

**Thoughts on Gladwell's *Blink***

### July/August

**The power of a question**

### October

**Don't slot me: the power of verbatims**

### November

**Ten tips for using interpreters in international research**

### December

**A little homework can work wonders**

## By the Numbers

### January

**The cool logic of chi-square**

### February

**Respondent goodwill is a cooperative activity**

## March

**First impressions are everything in b-to-b telephone surveys**

## April

**Wanted: a better choice in discrete choice**

## May

**Stop worrying about what is better**

## June

**Fielding ethnic research? The success is in the details**

## July/August

**Mail surveys - the right alternative**

## November

**European research panels growing, adapting**

## Software Review

### January

**Pulsar Web**

### February

**E-Tabs Enterprise**

### July/August

**DimensionNet/Dimensions 3.0**

### December

**XSight 1.2**

## Trade Talk

### February

**A certifiably good idea**

### March

**It's all about me**

### April

**Show me the moneyed**

### May

**I love my DVR**

### June

**The world could use a nap**

### July/August

**Quite the double-header**

### October

**Some satisfying reading**

### November

**ESOMAR panel research conference shines**

### December

**The Sox lost but research won**

# index of advertisers

<b>ActiveGroup</b> .....58-59 Ph. 800-793-3126   www.activegroup.net	<b>ESOMAR</b> .....21 Ph. [311] (20) 664-2141   www.esomar.org	<b>Mktg., Inc.</b> .....46 Ph. 631-277-7000   www.mktginc.com
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<b>Affordable Samples, Inc.</b> .....28 Ph. 800-784-8016   sales@affordablesamples.com	<b>Fieldwork Network</b> .....Back Cover Ph. 800-T0-FIELD   www.fieldwork.com	<b>NameLab, Inc.</b> .....78 Ph. 415-517-0803   www.namelab.com
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<b>Baltimore Research</b> .....3 Ph. 410-583-9991   www.baltimoreresearch.com	<b>Focus Pointe Global</b> .....55 Ph. 888-US-FOCUS   www.focuspointe.net	<b>The Olson Research Group, Inc.</b> .....13 Ph. 609-882-9888   www.olsonresearchgroup.com
<b>Behavioral Insights, LLC</b> .....63 Ph. 212-551-1411   www.behavioralinsights.com	<b>FocusVision VideoMarker, Inc.</b> .....25 Ph. 800-433-8128   www.focusvision.com	<b>On-Line Communications, Inc.</b> .....30,47 Ph. 800-765-3200   www.on-linecom.com
<b>Burke Institute</b> .....5 Ph. 800-543-8635   www.BurkeInstitute.com	<b>FocusVision Worldwide, Inc.</b> .....6-7, 81 Ph. 800-433-8128   www.focusvision.com	<b>Opinion Search Inc.</b> .111, Inside Back Cover Ph. 800-363-4229   www.opinionsearch.com
<b>Burke, Incorporated</b> .....24 Ph. 800-267-8052   www.burke.com	<b>GENESYS Sampling Systems</b> .....23 Ph. 800-336-7674   www.genesys-sampling.com	<b>PAI-Productive Access, Inc.</b> .....79 Ph. 800-683-3111   www.paiwhq.com
<b>Carbon View, Inc.</b> .....45 Ph. 866-340-7204   www.carbonview.com	<b>GfK</b> .....43 Ph. [491] 911-3950   www.gfk.de	<b>PGM Incorporated</b> .....60 Ph. 801-434-9546   www.pgminc.com
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<b>Data Recognition Corporation</b> .....9 Ph. 800-826-2368   www.datarecognitioncorp.com	<b>Incheck, LLC</b> .....76 Ph. 303-296-9593   www.incheckonline.com	<b>Research Now</b> .....17 Ph. [441] (20) 7091-7818   www.researchnow.co.uk
<b>Decipher, Inc.</b> .....75 Ph. 800-923-5523   www.decipherinc.com	<b>Informa Research Services</b> .....97 Ph. 800.848.0218   www.informars.com	<b>Ruth Nelson Research Services</b> .....64 Ph. 303-758-6424   www.ruthnelsonresearchsvcs.com
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## Trade Talk

continued from page 116

and movies – what could be better? But as he detailed the various problems he has to deal with in each movie focus group, from pleasing the prima donna director who gripes if his nonfat soy half-caf mocha latté isn't perfect to scanning the movie preview crowds for potential video pirates, I almost felt bad for the guy. Almost.

While Goetz never answered the burning question of just how in the world do so many awful movies get made, he did illustrate why the lowly focus group has achieved star status in Hollywood. To be sure, the method is much-maligned, just as it is in the real world. But while the moviemakers may not always like what they hear, they must recognize that there's really no other way to find out firsthand what members of their intended audience think of their creations. | Q

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## QRCA event emphasized sharing, learning

It's been five years since my last visit to a Qualitative Research Consultants Association annual conference and nothing has changed – thank goodness. At the QRCA gathering in San Diego in 2000, I marveled at the willingness of these independent moderators – who could rightly view each other as competitors – to share their hard-earned expertise during conference presentations.

The same spirit was on display in October at the group's 2005 meeting at the Beverly Hilton in Los Angeles. On the first day, Renee Fraser, CEO of Fraser Communications, Santa Monica, Calif., gave a fun, frank talk on work that her firm did with the Frederick's of Hollywood brand. The lingerie maker had a host of challenges facing it, including emerging from a 2000 bankruptcy filing and increased competition from Victoria's Secret. In spite of the bankruptcy, the company began a comprehensive research effort in 2001 to re-brand itself and better understand its customers and non-customers alike. Qualitative research was helpful in many ways. It reaffirmed the importance of product quality and gave Frederick's valuable insights into the language and psychology surrounding the wearing of lingerie.

Fraser also did anonymous in-depth telephone interviews with Frederick's employees to tackle a number of crucial questions: What are the strengths/weaknesses of the brand?

Who are the main competitors and what are their strengths and weaknesses? What are employee perceptions of Frederick's customers? What internal changes need to be made to “de-silo” the company? A company retreat also helped air internal disagreements and get the employees working from the same set of shared assumptions (different groups within the firm, for example, held different views of the customers).

Along with the wide-ranging case history Fraser also imparted some good advice for researchers of all stripes, whether vendor or client: always offer a point of view or perspective along with the research results; provide solutions to problems, not just descriptions of problems; think of yourself as a marketing or business consultant with your own practice – insights and understanding are what you create and deliver.

Other conference highlights included a wide-ranging overview of the packaging research process from Lauren Goldberg of Perception Research Services, Fort Lee, N.J., and a highly interactive session on perceptual mapping led by Pat Sabena and her daughter Nicole Sabena Feagin of Westport, Conn.-based Sabena Qualitative Research Services. These sessions perfectly captured the spirit of the QRCA conference. In the latter, the two presenters went through a series of hands-on demonstrations of mapping approaches for use during focus groups

such as hierarchical maps, bull's-eye maps and quadragrids, all while fielding questions from the large, enthusiastic audience. It was open and stimulating and extremely informative.

### A bit of Hollywood

Given the L.A. setting, it was only fitting to have a bit of Hollywood on the program. (As if gawking at *Desperate Housewives* Eva Longoria, Marcia Cross and Felicity Huffman, who were attending a charity event in the hotel ballroom one of the evenings, wasn't enough.) Kevin Goetz, managing director, executive vice president of entertainment research for Los Angeles research firm OTX (Online Testing Exchange), spoke about his firm's integral role in conducting research on the movies we see.

In addition to testing movie trailers, TV and print ads for upcoming releases, and tracking films after they are released, OTX also conducts preview screenings and post-screening focus groups, which are frequently observed by A-list actors, directors and producers.

Being a film nut, I was enthralled from the beginning and could have happily listened to Goetz, a natural presenter who mixed in a little movie biz dish here and there, talk for hours. After the first five minutes I thought he had a dream job. I mean, marketing research

continued on page 115



“...actually getting someone on the phone who understands my data collection needs and can answer my questions.”

## Seamless

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