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Fresh perspectives, intriguing research data, a glimpse at emerging technologies—attendees at CASRO events throughout the year note these benefits and many more in their conference evaluations. Our events consistently receive high marks for the quality of the speakers and the content. We are proud of these valuable educational opportunities and are pleased to share with you the following articles, based on presentations made during this year.

This is just a sampling of the topics discussed at our events. CASRO continues to act upon its 35-year mission to provide venues to learn about and discuss key issues impacting the research industry on all fronts, including online research, business and management, technology and legislation. Increasingly we offer the opportunity to learn from the comfort of your own desk via webinars on a variety of topics.

We appreciate the efforts of our conference committee members and all speakers, each expert practitioners in their field. We hope you’ll join us at our 2011 conferences to hear such presentations first hand and engage in the discussion that follows each session.

Diane K. Bowers
President, CASRO

Submit an Article to the 2011 CASRO Journal

As was the case this year, articles for the 2011 CASRO Journal will be gathered from conference and webinar presentations. We encourage you to respond to Calls for Papers, for such events as the Online Research Conference and Technology Conference, and welcome ideas for presentations/panel discussions on various subjects at such events as our Management and Annual Conferences, or for webinars. You may also submit article proposals to us at journal@casro.org.

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Can Routers Safely Increase the Carrying Capacity of Online Respondents?

by Paul Johnson, Senior Analyst and Bob Fawson, Vice President, Online Services at Opinionology

This paper was presented at the CASRO Panel Conference, February 24-25, 2010 in New Orleans.

Hardin’s (1968) “Tragedy of the Commons” explains how rational people could destroy a common resource. He used a sheep grazing example where each herdsman had an incentive to increase their herd size and maximize individual profits, while the jointly owned meadow is degraded by exceeding its carrying capacity. In the research industry, we are responsible for the ‘herd’ of potential respondents. Individual researchers rationally lower costs by subjecting respondents to low qualification rates, poor survey design, and low respondent rewards; however in the process they erode the pool of potential respondents. We have already seen the tragedy in action as telemarketers, poor survey designs, and interviewing techniques have caused telephone cooperation rates to decline from 60% to 30% (Keeter, 2000). The online research industry will be next to start feeling the ill effects of mismanagement of respondents.

Commons problems have been successfully solved in a number of ways: voluntary usage limitations, group transparency, and technological innovation. Current research initiatives have vastly improved industry transparency while industry organizations work towards voluntary usage limitations. Technology, however, may be our best solution. Potentially, a router can be the technology to increase the carrying capacity by doing two things: using respondents more efficiently and adding more respondent sources into the mix of respondents. When using this technology, researchers should understand sample source bias, survey selection bias, respondent fatigue, and prior survey conditioning effects before utilizing routers extensively.

As we explored routing technology, we identified routing bias in two forms: source bias and configuration bias. We wanted to isolate and compare bias from each element. Many router configurations have introduced configuration bias by attempting to improve efficiency using needs-based survey selection. To mitigate configuration bias, our router used a completely random survey selection process. Instead we attempted to increase efficiency by allowing the respondent to complete more than one survey per sitting. Our basic router configuration allowed one complete per sitting while our session-based router configuration allowed up to three surveys limited to a maximum engagement of 20 minutes per sitting. To examine source bias, we tested an online access panel (Opinion Outpost), a typical river sample, and a social community sample (Family Link).

Respondent fatigue is a tangible measure for response quality so we examined common fatigue metrics across the source and router configurations. The session-based router did not significantly increase respondent fatigue when compared with the basic router. The first
measure of fatigue, average time spent in a survey, did not change with router configuration, but did change across sample source (Figure 1). Family Link respondents, who were inexperienced at taking surveys, naturally took longer to complete the surveys. Straightlining, a common fatigue measure, demonstrated no statistically significant differences across router configurations, although we did observe a directional increase from the session-based router (Figure 2). The final fatigue measure, the length of verbatim responses, did not vary significantly by source or router configuration (Figure 3). Thus the session-based router demonstrates no significant increase in respondent fatigue.

The session-based router decreased survey selection bias in one of the surveys during our experiment. In the basic router, low income respondents randomly selected for the investment survey were disqualified and re-routed to another survey. This routing increased the proportion of low income respondents in other surveys. The session-based router reduced the selection bias by allowing the high income respondents to reroute to the other surveys as well. The resulting income distributions are shown in Figure 4.

Lastly we looked at data differences in the questionnaires by sample source and router configuration. We observed significant source and configuration differences to varying degrees. We examined the percentage of questions across all four surveys that exhibited a significant source or
configuration effect (Figure 5). These results suggest that although the router configuration does affect results, it does so to a much lesser extent than the source of sample.

As the demand for online research increases, the industry will need to increase the carrying capacity of online respondents. One solution is to define and implement survey routing best practices. This initial research suggests that a session-based router can potentially increase efficiency, while decreasing survey router bias and preserving survey data quality. While router configuration does affect survey data, the effect is far smaller than the inherent variance across sample sources. Well designed routing platforms can help meet future demand and avoid the “Tragedy of the Commons.”
REFERENCES


ABOUT THE AUTHORS

Paul Johnson

Paul is Senior Analyst at Opinionology. Paul specializes in online sampling design and advanced analytic methods. Paul’s research based approach to identifying and recommending solutions positions him well to investigating panelist behavior; oversee data processing efforts; improve online data integrity and provide advanced analytic support to clients. Paul also is actively pursuing a research agenda on survey research methods and applications of conjoint methodology. His research on research efforts have been featured regularly at ESOMAR, AAPOR, CASRO and Sawtooth events. Paul holds an M.S. in Statistics and B.S. in Actuarial Science from Brigham Young University. He joined Opinionology in 2006.

Bob Fawson

Bob is Vice President of Online Services at Opinionology. Bob has leveraged his education, industry experience, and research background to grow Opinionology’s portfolio of online sampling methods and improve methods to intelligently manage online panel inventories. Bob continues to explore the nuance of online research methods and panel management techniques. His efforts have improved industry understanding of many diverse topics from panel recruiting and sample routing to address based sampling. He is often asked to present his findings in market research forums. Previously, Bob managed Opinionology’s online client service and project management team. Bob holds an M.S. in Political Science and an M.S. in Applied Economics from Utah State University. He joined Opinionology in 2007.
Pitfalls of Corporate Entrepreneurship

by Robert Wolcott, Executive Director of Kellogg Innovation Network, Kellogg School of Business. The following is an excerpt from his book, Grow from Within: Mastering Corporate Entrepreneurship and Innovation


Corporate entrepreneurship can be treacherous. While various factors pose threats, such as adverse economic cycles and top leadership turnover, three particular conditions under the control of management can impede corporate entrepreneurship initiatives: becoming too narrow, too broad, or misaligned.

Too Narrow

The Efficiency Constraint

The better an organization becomes at specific activities and processes, the more difficult it is to change. These constraints affect everyone operating within an established company, although the challenge for the corporate entrepreneur is much greater. New businesses may not integrate with some aspects of the existing company. Sometimes they even conflict. For instance, cannibalization of existing product sales, real or perceived, is a common source of conflict. This bias toward efficiency, with its downside of inflexibility, highlights the need for corporations to create deliberate, focused corporate entrepreneurship capabilities. A critical role of corporate entrepreneurs is to help companies overcome narrow, short-term thinking, so that they remain great companies in the long term.

Internal Bias

Corporate entrepreneurship requires companies to learn. If you’re building new businesses, you’ll need to seek external knowledge. However, finding and engaging outside companies can be tricky, particularly when sensitive intellectual property or trade secrets might be involved, leading to fears of losing competitive advantage. Many companies underestimate the time it takes to find the right partners and negotiate deals, and many fall prey to zero-sum thinking. Top corporate entrepreneurs understand that external network development should be one of their team’s competencies, and they alter internal incentives to encourage it.

Concept Myopia

Innovation teams often become enamored of limited aspects of their new venture, such as perfecting the product or technology or devising the right marketing strategy. Conversely, new business teams can let their creativity and enthusiasm get the best of them, wandering off in various appealing directions that fail to lead anywhere substantial. As a corporate entrepreneur, one of your duties to your company is to constantly question assumptions, not just of new ventures but even regarding the fundamental design of your core businesses. If no one inside your company is doing so, others in the marketplace eventually will.
Too Broad

Lacking or Losing Focus

A team of creative, motivated people that is pursuing the future is always at risk of having too many promising opportunities to pursue. As opportunities present themselves, or when business unit and functional leaders come calling, it can be difficult to say no. Mission clarity and focus differentiates many of the corporate entrepreneurship initiatives that succeed from those that fail. Taking their cue from the military, where every day is about defining mission objectives, determining means, and then acting and evaluating, corporate innovators need to understand the power of mission. Mission clarity means that we must articulate what it is that we are trying to accomplish. Mission focus means that corporate entrepreneurship teams have specific objectives. Clarity regarding innovation and corporate entrepreneurship objectives is a more nuanced and critical question than most managers realize.

The Culture Change Trap

Building a culture of innovation should be an objective of every company that is seeking growth and relevance in the long term. Corporate entrepreneurs and larger innovation teams can have a positive impact on a company’s culture, but explicitly acquiring the role of culture change agent should be pursued with caution. Creating culture change company-wide typically requires a serious mandate from and direct engagement by the CEO and his or her lieutenants. If the top group fails to model innovative behaviors and make an ongoing, credible case for innovation, real culture change will be a losing game. In our view, UPOD—underpromise, overdeliver—is especially important for corporate entrepreneurship or major innovation initiatives. Communicate widely only after you have successes to tout, rather than setting expectations that you may or may not achieve as quickly as you originally expect.

Misaligned

Insulation versus Isolation

Most experts and practitioners agree that teams that are pursuing radical innovation, and certainly new business creation, typically require some form of separation from the company’s established business units. But separation must not mean isolation. When a company intends to pursue new paths requiring limited contributions from the core businesses, with no plans to fold the new businesses into the company’s established units, a separated ventures group may make the most sense. In businesses that depend on sophisticated technology integration, a development and prototyping organization—that is, a “skunk works”—can be beneficial. But without consistent, deliberate engagement with important players across the company, the new business creation team will become isolated and be unable to reintegrate successful projects back into the company.

Changes in Strategic Priorities

It is impossible to eliminate the risk that your company will make significant changes in its strategic priorities that will affect the importance of new business creation. New business creation efforts are particularly vulnerable to economic downturns, when cost cutting takes priority over investment in the future. To counter this, start by ensuring that everything that your corporate entrepreneurship team does supports your company’s stated strategic vision in some meaningful way. Ideally, create explicit strategic progress metrics and track them diligently. An astute new business creation team builds a portfolio of opportunities that enables it to shift its focus as corporate priorities shift. The team members also work hard to ensure that leaders around the company have vested interests in the team’s projects.

The Pure-Play Challenge

Public companies face a particular challenge in implementing ongoing corporate entrepreneurship efforts: the suspicion (or even the ire) of Wall Street. The investment community has come to frown on diversified conglomerates, believing that the most successful companies in a given industry are the ones that focus exclusively on that industry. While often justified, such stances tend to be overdone to the extent that investors punish public companies that experiment with new markets, with potentially dire consequences for executives. Therefore, launching a corporate entrepreneurship effort may require some
explaining to the investment community, to show the long-term value to shareholders. For opportunities that appear to be “too far” outside the corporate core, it may make sense to use an external structure, such as a joint venture or spin-off, though doing so could diminish future opportunities since the new venture won’t leverage as much of the corporate core.

ABOUT THE AUTHOR

Robert Wolcott

Robert was the keynote speaker at CASRO’s Management Conference in Chicago in June, 2010. He teaches corporate innovation and entrepreneurship for Kellogg in Evanston, Miami and Hong Kong. Formerly Visiting Professor at the Keio Business School (Tokyo, Japan), Rob is advisor to NORDEN, the Nordic Innovation Center, Nordic Council of Ministers, Oslo, Norway, and a member of the Global Technology Council of Kraft Foods, Inc. His book, with Dr. Michael Lippitz, Grow From Within: Mastering Corporate Entrepreneurship and Innovation was published by McGraw-Hill in 2009. Rob’s work has appeared in MIT Sloan Management Review, The Wall Street Journal, Advertising Age, Business Week, The Financial Times (UK/European Edition) and the New York Times. He received a B.A., European and Chinese History; and an M.S. and Ph.D., Industrial Engineering & Management Science from Northwestern University.
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There is considerable debate regarding social media market research best practices and what is needed to ensure that it evolves into a vibrant and healthy field of research for years to come. Missing from the discourse, however, has been information on consumer attitudes towards social media research.

To that end, we conducted a convenience sample of 426 U.S. members of the Opinionology panel, asking them about their concerns on Internet privacy, their awareness of market research use of social media and their attitudes towards such use. (Of course, such a survey cannot be projected to the entire American online population, since it does not use a random sample.)

Sixty-nine percent (69%) of respondents were aware that “organizations monitor and analyze public Internet discussions.” When asked which type of organizations did this, 52% of respondents identified law-enforcement agencies, and 45% said that they were aware that market researchers did this.

The questionnaire introduced respondents to the idea of social media market research and then prompted them to discuss what they liked and disliked about such research. A fairly common positive attitude was that of one respondent, who said, “It provides marketing researchers with an understanding of the real life reaction to a given product. That, in turn, leads to a better product for consumers.” Negative attitudes, though, stemmed from respondent perceptions of the privacy of their social media data: “A little too close to ‘Big Brother is watching,’” said one, “but you should know enough to never post if you don’t want others to read it.” In another fairly typical comment, a respondent said, “I consider it an invasion of my privacy, much like reading my mail from the USPS.”

Ninety-five percent (95%) of the respondents have some concerns about Internet privacy, with 40% being very or extremely concerned. That said, respondents concerned about Internet privacy don’t engage in fewer online activities; they don’t comment less often on websites than unconcerned users do; they aren’t less likely to use photos of themselves when posting comments. In fact, people very concerned about Internet privacy are pretty much the same as people only slightly concerned about Internet privacy.

Most social media market researchers show comments they’ve collected from websites in order to showcase particular opinions and to add narrative to their quantitative data. Ignoring the consumer desire for privacy, some researchers will even attribute these com-
ments to the individuals who made them, by name. While they would never do this with survey respondents, as it is forbidden by the CASRO Code of Standards & Ethics for Survey Research, social media comments seem different: they are publicly accessible through search engines, after all.

What do consumers want? When it comes to attribution, only 7% of respondents want quotes attributed to them by their real name, though another 20% are willing to have quotes attributed to their screen name. The majority (66%) would prefer not to be identified. Yet researchers who do attribute comments by name point out that, even if they didn’t do so, such quotes can be easily found through search engines.

The issue of contacting consumers is a complex one. On the one hand, consumers don’t want to be contacted by market researchers: coming in dead last of the seven groups we asked about was independent market researchers, which only 15% of respondents were open to being contacted by. On the other hand, 85% of consumers want researchers to ask permission before using their quotes: sadly, some consumers fear market researchers will willfully misinterpret their responses, and others fear researchers will get it wrong through incompetence.

While Web 2.0 and social media are often presented as a means of engaging with consumers, most who are using social media are doing so to connect to family, friends and colleagues—not researchers. As one respondent said, “I’m entitled to my own opinion without some media marketing research using or interfering with my comments, and wanting to make a big deal out of it, good or bad.”

Another respondent summarized a concern shared by those researchers who have been advocating against engagement: “It could lead to less comments if people think they may be hassled by the researchers.” And that is something no member of CASRO wants to see, no matter what their views on specific best practices for social media research.

ABOUT THE AUTHOR

Jeffrey Henning

Jeffrey has been a market research consultant, analyst and writer as well as a software developer and is a member of CASRO’s Social Media Research Task Force. Jeffrey co-founded Perseus Development Corp., developed SurveySolutions for the Web and led the marketing and software development teams that pioneered the concept of Enterprise Feedback Management. Earlier, he worked with BIS Strategic Decisions (now part of Forrester Research) in the U.S. and Europe managing survey research projects for the Fortune 1000. He writes regularly on the Vovici blog and has written the e-book Survey Software Success.
Stay Nimble with Quarterly Strategic Planning

by John Gongos, President/CEO, Gongos Research, Inc.


With the swift pace of change in today’s business environment, the traditional mode of annual strategic planning has become an outdated method of guiding the vision of a company. The state of affairs in most industries and individual businesses are changing rapidly, which means that priorities need to adjust quickly.

At Gongos Research, we adopted a Quarterly Strategic Planning process several years ago that has been integral in guiding us through many curves and bumps in the road. While the process is grounded by big picture trends and long-term goals, it operates in 90-day increments that force us to move quickly with our new initiatives and allow us to stay nimble and flexible as a company.

There are two primary advantages of the Quarterly Strategic Planning approach that we employ: **Time Frame** and **Focus**.

**Time Frame:**

While the research industry does not change as rapidly as some industries, it is clear that the pace of change has increased dramatically in recent years. With technology serving a more important role in our business and the increased volatility of the economy, you can bet that the picture will look different six to nine months from now than it does today.

A fairly recent example of this occurred in the second half of 2008 when the bottom dropped out of the research business. After two years of brisk growth at Gongos Research, our top priorities at the beginning of 2008 centered on recruiting and hiring new staff, as well as on-boarding them as quickly as possible. By the middle of the 3rd quarter of that year, business had dropped significantly and our focus quickly shifted toward intensifying business development efforts and utilizing freed up capacity toward additional training of new staff.

The second drawback of the traditional 12-month time frame of annual planning is the lack of urgency. I can remember years ago when we conducted annual planning sessions when we would come back feeling excited and proud of the plan we had developed. After spending a few weeks getting caught up with our clients and other urgent requests, some of the teams would begin to get started on our new goals, but would invariably not gain much momentum. Knowing that we still had 11 months left to complete our goals, they were not deemed as urgent as the numerous hot project requests that would bombard us daily. After three months passed, the plans began to get a little fuzzy, but we didn’t see it as a problem because there was plenty of time left. At the six-month mark, I sometimes could not even find my planning folder!

In reality, having 10 to 12 top priorities is the same as not having any priorities at all.
The point is our time is limited and people prioritize their time on tasks that are “important” and “urgent”! By operating in a 90-day planning cycle, we moved Strategic Planning activities from the “important but not urgent” category to the “important and urgent” category. Now if we wait three weeks to get started on an important goal, we only have 69 days left and the clock is ticking.

Focus:

The second unique characteristic of our Strategic Planning process is that we limit the number of goals for any time frame to five (at the most). At the beginning of the year, we decide on our top five long-term goals (three years), top five one-year goals, and our top five 1st quarter goals. Each quarter, new quarterly goals are set (no more than five) with our longer term vision in mind.

Every company has limited time and resources, which is why it is important to distinguish what is really important. In reality, having 10 to 12 top priorities is the same as not having any priorities at all. The advantages of limiting it to five top priorities are two-fold. First, the process of narrowing it down to the top five creates very healthy debate among the leadership team. While it is easy to narrow your priorities down from 15 to 10, getting from 10 to five (or less) requires great dialogue. This is the time when the tough choices are made, and it forces us all to take a “gut check” about what is truly critical to tackle in the next 90 days to make headway on our annual and long-term goals. The second advantage is simply the focus it creates. When the entire company concentrates on five goals, the results can be amazing.

In summary, here are the key steps in a successful Quarterly Planning Process:

- Develop 3-year goals, 1-year goals and 90-day goals
- Absolutely no more than five goals for any time frame
- Day-to-day activity is focused on accomplishing the 90-day goals (successful completion of these goals should get you to your longer term goals)
- Frequently communicate both the goals and progress to the entire company
- Get employees throughout the company involved on goal-focused teams
John Gongos

John participated in a panel discussion with fellow market research company CEOs at CASRO’s first Management Conference in June 2010. After serving key positions on both the client and supplier side during the first eight years of his career, John founded Gongos Research in 1991. Initially serving primarily the automotive industry, today over 75% of the company’s revenues come from non-automotive industries (consumer products, financial, retail, technology). John earned his B.S. at Miami University (Ohio) and his M.B.A. at the University of Cincinnati with a focus in Marketing and Quantitative Analysis.
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Curing Underperforming Sales: Know the Problems Before Seeking Solutions

by Bill Guerin, Partner, Cambiar LLC

Bill presented at the CASRO Management Conference, June 16-17, in Chicago.

At Cambiar we embrace the principle that a problem well-defined is half solved—and so when we consult with research companies to improve their sales performance, we invest significant time in really understanding why a sales program is underperforming. This article highlights just a few of the most common causes we have found in our work with dozens of research firms, and also provides some suggested solutions.

Cause #1: The company’s executive management knows the sales program is underperforming, but isn’t clear as to where, why or what to do about it—and so sub-optimal performance is tolerated or a series of short-term quick fixes are attempted (e.g., Hire a rainmaker!) in the hope of improving performance.

Solution #1: Conduct a comprehensive assessment of the sales program to understand and align four categories of interrelated sales needs:

- The **Business Needs** define the end results the sales organization must achieve to meet its business objectives—e.g., grow annual revenues by 10% with half of the growth coming from new clients. Sample questions to explore business needs include:
  
  ✓ Are your account managers going after the most promising opportunities and emphasizing the right products and services?
  
  ✓ How much of your sales growth should come from new clients versus existing accounts?

- The **Performance Needs** describe the day-to-day sales behaviors that are most critical to achieving the Business Needs—e.g., dedicate 20% of sales efforts to new business development activities. Sample questions to help identify performance needs:
  
  ✓ What’s the best sales model for your organization—the seller/doer account manager, hunter and farmer account executive roles, full-time business developers, or some combination?

  ✓ What are you doing to address under-performing salespeople?

- The **Training and Development Needs** identify the skills and capabilities that salespeople must possess to successfully execute the activities defined in the Performance Needs—e.g., using direct marketing techniques and follow-up calls to identify and qualify new prospects. Sample questions to help identify training and development needs:

Sales performance improvement is an ongoing process, not a once-and-done exercise.
What are the core competencies required to be successful in your sales model and how to your current salespeople stack up?

How effective are your sales managers in leading and developing your salespeople?

Finally, the Infrastructure Needs define the systems, procedures, tools, investments and other items needed to support the Training and Development, Performance and Business Needs—e.g., sales goals and incentive plans that differentiate between new and existing clients. Sample questions to explore infrastructure needs:

- How effective is your system for planning, capturing, reporting and managing sales activities and customer information—e.g., Siebel, salesforce.com, etc.?
- How can you improve your ability to gather competitive intelligence and use it to your advantage in sales?

Once these need areas are well understood, opportunities for improvement naturally emerge from the assessment process.

Cause #2: The company’s value proposition isn’t clear and compelling, or it’s not being communicated consistently or effectively across the sales and account management organization.

Solution #2: Develop a “30 Second Commercial” for your company that articulates your core value proposition in a way that differentiates you from your competitors and captures the interest of prospects. Write it from the perspective of a potential client, include a broad cross-section of your employees in the process, establish the key points to be made company-wide and then allow individual salespeople, account managers and other client facing employees to develop a personal commercial in their own words and style—and then have them practice it until it flows naturally.

Cause #3: The organization is very good at reacting and responding to opportunities, but much less effective at proactively creating new business. Oftentimes the company’s sales strategy and objectives are nebulous or overly general and not driven down in the organization through simple, aligned execution plans.

Solution #3: This issue is endemic to our industry and there are many simple but proven approaches for dramatically improving sales performance . . .

- Establish a set of qualifying criteria for your most desired clients and use those criteria for targeting prospective clients, as well as prioritizing your sales efforts to grow existing accounts
- Ensure that your sales recognition and reward systems appropriately differentiate between new and repeat business
- Use marketing activities to pre-qualify prospects so your salespeople are doing more warm calling than cold calling
- Establish a set of a sales key performance indicators that are both retrospective (closed sales) and prospective (sales pipeline)
- Develop account plans with simple strategies and 30-60-90 day action plans
- Conduct short, frequent sales pipeline and account reviews with all salespeople

Finally, sales performance improvement is an ongoing process, not a once-and-done exercise. Keep in mind that you don’t have to do everything, but you do need to do something—so think big, start small, act now!
ABOUT THE AUTHOR

Bill Guerin

Bill is a sales, marketing and general management executive who has helped several organizations improve their business performance while also generating greater commitment, engagement and loyalty among their employees and customers. Bill has 25 years of experience with large, small and mid-sized companies in a variety of industries and roles. Prior to joining Cambiar, he was Executive Vice President of Client Solutions for TNS. At TNS, Bill built and managed their highly successful new business development program, was the chief architect of the company’s sector-practice area collaborative sales model, and established and led the North American group of specialty practice areas, which included the company’s highest growth and most profitable revenues. Prior to TNS, Bill worked as corporate head of sales for Total Research Corporation and Harris Interactive, and was Director of Sales and Marketing for PPL, a $6 billion Fortune 500 diversified energy company. At PPL, Bill led the transformation of the sales force from a conservative monopoly environment to a highly competitive, performance-based culture through a comprehensive change management program. Bill holds a B.S. degree in engineering from Swarthmore College and an M.B.A. in management science from Wilkes University. He has also completed a number of advanced courses in sales, marketing, communications, management, leadership and motivation.
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Market Research is Dead?

by Andrew Jeavons, Mass Cognition LLC

Presented at the CASRO Technology Conference, June 3-4, 2010 in New York City.

Change can be hard to recognize. It happens all the time, and often goes unnoticed. Currently there is a lot of talk about “new MR” or “next generation MR.” It’s all about what people think MR will become. However it is a debate whose time has already passed, because the change has already happened.

Google has many interesting tools, one of them – trends.google.com – allows you to see the relative frequency of search terms used on Google. It can be quite informative to look at what is being searched for.

Below is a graphic showing the search frequency for “word processing”:

![Graph showing search frequency for word processing](image)

*The last value prior to the forecast is based on partial data and may change. **Forecast values are based exclusively on the extrapolation of past values.

Obviously as a search term it is declining, as it is no longer a term used in general speech. There was a time when it was far more frequently used, but society and the concept of work has changed. We still perform what used to be termed “word processing” but it is now accepted as just part of work on general, it has lost its unique meaning.

Below is a graph showing the search frequency of the term “Customer”:

![Graph showing search frequency for customer](image)

*The last value prior to the forecast is based on partial data and may change.

Not surprisingly there is an upward trend. The recession has put this word on everyone’s lips.
This graph resembles the graph for “word processing” far more than the graph for “Customer.” The most significant conclusion from this is that if you want to improve your performance in Google searches, using the words “market research” is not the way to go. The “market research” term is declining in usage, at least in terms of Google searches. The operations which we term market research are still carried out, but the term market research is in decline. Times have changed.

In general we resist change, and we resist especially the idea of radical change. The truth is that radical change is by no means uncommon. We’ve all recently experienced a radical change in the financial markets. The book by Michael Lewis (2010) called *The Big Short: Inside the Doomsday Machine* has some observations on how so many people simply did not believe such a radical change could come. He talks about two people who did believe that the market could crash so spectacularly (my bold):

“...Theirs was a union of weirdly like-minded. Ben shared Charlie’s and Jamie’s view that people, and markets, tended to underestimate the probability of extreme change...”

Rene Thom, a French mathematician, set forth his theory of how situations can change radically in his “Catastrophe Theory” in the late 1960’s. This theme was rediscovered by Malcolm Gladwell in his 2002 book *Tipping Point*. Earlier this year Apple’s market capitalization exceeded that of Microsoft’s, a situation that was unthinkable 10 years ago. Ray Poynter, a well known commentator and market researcher said at a conference this year that in “20 years there will be no surveys.” This may seem like a radical statement, but it can’t be ruled out.

**What is Changing?**

There are two innovations that are affecting market research, besides the relentless spread of web based technology and commerce. These two innovations are social media and so called “neuromarketing,” which is simply applied cognitive neuroscience.

With regard to social media it seems clear that its relevance or effect on market research as we know is related to how it is changing commerce rather than research. It’s doubtful that qualitative research technique will have to be radically changed to cope with social media. Rather it is the way social media is changing the sales process that affects market research. An example is the jewelry business, which is one of the oldest industries known. The advent of the web and web sites such as Bluenile.com has placed tremendous pressure on bricks and mortar retailers to compete. Price has become a burgeoning factor. If you read any trade magazine for jewelers you will see articles about using Twitter.com and Facebook.com as part of a marketing strategy, particularly to younger consumers. This is being repeated across the range of commercial activities. Web sites such as Foursquare.com, which is a location based social network, offer all sorts of new opportunities to retailers. This also applies to market research, if this is what it is to be called in the future. Putting a “2.0” after MR or “Next Generation” before it won’t be enough, after all “VHS 2.0” would hardly excite anyone.
The good news about social media, which despite what anyone may think in Luddite moments, is of great importance, is that it is accessible. Concepts from more traditional MR can be applied to this environment as many researchers are doing.

This accessibility does not hold for Neuromarketing. Neuromarketing or Cognitive Neuroscience has a fundamental belief that what people say about their motivations or reasons for behavior are hardly ever accurate or meaningful. Cognitive Neuroscience believes that by looking at brain activity predictions can be made with more accuracy as to how consumers will behave in the market place. It is a field with a vast amount of money being invested in it, with technology that are wholly alien to almost every market researcher. There are also long tried and tested theories of cognition used in Cognitive Neuroscience that are unknown to market researchers. Cognitive Neuroscience has a lot of investment and people fervently interested in making the application of it to marketing succeed. It already is succeeding. It is the greater challenge to traditional MR as unlike social media logging onto a web site and reading a book or two will not get you anywhere close to “up to speed” on the subject.

The assumption that the “market research” industry will continue the way it is, more or less, is almost certainly wrong. The pressure of the financial crisis is forcing an evolution in the way businesses research the market place. Using the term “market research” is probably no longer a useful strategy, it is a concept and term that has passed, in the same way as word processing seems dated, so is market research. Trying to work out what consumers or businesses will do will always be needed, how that is done is changing. It has already changed.

ABOUT THE AUTHOR

Andrew Jeavons
Andrew has been active in the survey and market research business for over 25 years around the world. He has worked in Europe, the USA and APAC. He currently lives in Cincinnati, Ohio, USA. After studying neuropsychology at Birkbeck College in London UK, he then worked in the medical statistics department of the Institute of Neurology in London UK. Andrew worked as a software developer for Quantime. He was one of the founders of the software company E-Tabs, and a founder of a software consulting company now called Cobalt Sky. In the last ten years he has worked for survey software companies in a marketing, sales and strategic development capacity. He has also written numerous articles for ESOMAR publications and a range of international conferences.
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Measuring Selection Bias Introduced by Routing

A comparison of different routing techniques

by Scott Porter, Executive Director, Marketing Science and Innovation, Ipsos Open Thinking Exchange,
Olivier de Gaudemar, Senior Vice President, Ipsos Open Thinking Exchange,
Mark Kimura, Director, Ipsos OTX MediaCT

This paper was presented at the CASRO Panel Conference, February 24-25, 2010 in New Orleans.

Editor’s Note: Since this presentation, OTX was acquired by Ipsos.

Introduction

Respondent routers which allocate a single stream of respondents among multiple surveys are becoming more prevalent. Various methodologies exist for selecting a survey for a respondent in a router. Intuitively, it seems that certain methods of combining multiple studies in routers have the potential to introduce a selection bias as opposed to study-specific, invitation-based samples. However, this potential effect would be somewhat difficult to measure because the potential bias introduced at any given time will depend on the mix of qualification requirements for the studies in the router, as well as the rules used for routing between the various surveys.

The research presented will introduce a method of calculating the potential bias introduced by any particular methodology of respondent selection within a router. In addition, the research also introduces a method of comparing the selection bias between different router configurations using a simulation-based experimental design. Some common routing schemes will be compared under various conditions. This research will attempt to answer for each of the conditions examined if using a router as opposed to a study-specific invitation affects the results of the study, and if different routing approaches differ in the magnitude of their effect.

What is Routing?

There has been little to no publication on survey routers in the market research industry. Yet, there are several technologies which have been developed since the early days of online research which can be grouped under the name of survey routing. Since we could not find a definition for survey routing in any industry glossary or in other papers on survey sampling, we would like to propose one:

“A selection mechanism by which an incoming respondent is assigned in real-time to one or multiple surveys, generally after a screening process.”

Here is a diagram to illustrate. Untargeted sample stream enters the router, which uses some algorithm to determine which respondents are assigned to each of two surveys available.
Advantages of Routing

The various survey routing technologies have each been developed in order to provide certain operational benefits. For example:

- Routing reduces the manual steps necessary to send sample to a survey. Through one sample drop, a sample provider is able to expose a single selection to a large number of surveys and quotas. This makes online fieldwork more efficient, which is particularly valuable when several sample sources are blended.

- Exposing a much larger volume of traffic to a single-point of routing also makes it significantly more practical to identify the “needle in the haystack”—the additional scale is important when looking for relatively rare respondents, as is the case with low-incidence target groups or quotas for small subgroups.

- Routing provides an alternative to turning away willing respondents. Disqualification from surveys is a major cause of panelist dissatisfaction and is often considered to be a primary cause of panel attrition. As a consequence, a proper execution of survey routing has the potential for a better user experience and higher panelist retention.

- Finally, routing makes river-type sampling possible. River-type sampling is defined by the Association Collaborative Effort (ACE) as “generating survey respondents by placing ads, offers or invitations on high traffic web sites or publications.” A media campaign may generate a constant stream of willing respondents, and routers provide a persistent location where the media campaign can direct these respondents.

Challenges of Routing

The operational challenges of routing are known. Routing requires economies of scale—on the one hand access to a large and consistent flow of respondents and on the other hand a large and consistent universe of surveys. There is also currently no off-the-shelf routing solution available to be licensed, so companies with the intention to route respondents need to develop proprietary technology—a significant investment.

The methodological concerns with routing are not well-understood—the concerns are primarily anecdotal, with little that is well-defined or quantifiable. In an effort to move forward the understanding of routing methodologies we propose a concept that could be termed “routing bias” or “selection bias in a routing process” with some associated metrics.

How does selection bias occur in a routing process and how can the bias be measured?

Our conception of a selection bias in a routing process is a difference in the incoming traffic and traffic routed to a survey that is attributable to the configuration of the router (e.g., the system of policies, rules, and/or algorithms that make up the particular routing implementation). We will quantify the selection bias by examining the differences between the sample that enters the router and the sample that is being routed to a survey.

Since survey routing is a topic unfamiliar to most survey researchers, we have prepared some simple examples explaining selection bias in a routing process.

Consider a situation with two surveys—a survey targeted to people who watch music videos and a second survey targeted to people who watch TV on the Internet. The surveys have different targets, but their targets overlap.¹

There are different ways for these two surveys to share the stream of respondents that enters the router.

Routing Method: Pure Priority

One way to share the incoming respondents is to send all the respondents to one survey first. Only those respondents that do not qualify for the first survey would be sent to the second survey. This method could be termed a pure priority based router.

Routing Method: Pure Random

Another way to share the respondents is to randomly assign each respondent to one of the surveys. Using this method of assignment, the online TV survey is no longer completely missing respondents who qualify for both surveys. However, both surveys will experience some selection bias.

Bias Calculation

Depending on how much of the time the two surveys share the router, the online TV survey will under-represent music video watchers by some amount. Whatever the magnitude of this difference is will be attributed to selection bias of the routing process.

For example, assume that in the incoming traffic, 60% of those who qualify for the online TV survey qualify for both surveys. If in the survey completes for the online TV survey only 40% qualify for both surveys, then we define the bias as 

\[ (0.60 - 0.40) = 0.20 \]

Adding Additional Surveys

Consider a situation with three surveys. Although the three surveys each have different targets, all three targets overlap. The respondents in the online TV survey should reflect a certain proportion that also qualify for the Music Video survey and a certain proportion that also qualify for the Movie survey.
Maximum Bias Calculation

With three surveys, there are two biases to examine. If there were 100 surveys, it would be overwhelming to examine 99 biases, so a summary measure is necessary for the overall bias.

Throughout this paper we will use the maximum bias that the online TV survey receives for any of the other survey criteria as a single summary measure for the selection bias experienced by the online TV survey.

Simulations of Router Implementation

Methodology

Introduction to the simulation

A short overview of the steps in our process for simulating the routing environment:

1. Each virtual respondent is defined in terms of whether or not the respondent qualifies to each of the surveys in our simulated router.
2. Several thousand respondents are generated in order to represent incoming router traffic.
3. This same group of respondents is simulated multiple times, each time being routed using a different algorithm and under different router conditions. In this presentation only the simplest possible routing algorithms are simulated, but this method could also be applied to more sophisticated routing methods.
4. The stream of respondents entering the router and the stream of respondents that reaches the survey are compared and the bias and maximum bias are calculated using the definitions given in the previous section of the paper.

5. The simulations are run multiple times with different groups of generated respondents and the results are averaged across all of the simulations.

Programming platform

In programming this type of simulation, there are two choices:

1. A very high fidelity simulation using the actual routing platform, quota system, etc., “harnessed” to a module that generates the simulated responses
2. A lower fidelity simulation using non-production code that re-creates the essential characteristics of the routing platform being analyzed

This paper follows the second option. The respondent generation and routing simulation components of the simulation were all programmed using the statistical programming platform R. This allowed great flexibility in terms of testing routing configurations that might not exist in practice.

Simplifications

The simulations do have some simplifying assumptions:

- Respondents can only take one survey
- No respondents break off from surveys
- Quotas in total only
  - no quotas for demographic subgroups
  - no quotas for behavioral/attitudinal subgroups

In our opinion, the maximum bias seemed to be the most useful summary measure. Alternative summary measures we considered were average bias, average of absolute bias, sum of all absolute bias, sum of squared bias.

Avatars: http://www.abi-station.com/english/
Incoming traffic is a balanced representation of the US online population

Perhaps in future research some of these assumptions can be relaxed, but the simulations are realistic enough for the purposes of this paper.

Experiments

We conducted 5 experiments, each designed to measure a distinct aspect of the routing system. Purpose of each experiment:

- Speed to fill: Determine the difference between the random router and the priority router in terms of speed to fill.
- Correlation between survey criteria: Examine effect on bias of changing the overlap between survey criteria.
- Priority placement: Measure difference in the degree of bias experienced by surveys in 1st priority, 2nd priority, 5th priority, etc.
- Number of concurrent surveys in the router: Determine if the bias is affected as more surveys are added to the router… 3, 4, 5, etc.
- Survey impact: Evaluate the impact of the selection bias on the survey question results. For example, assuming a survey receives 20% less music video watchers, how much does it change the responses to questions within the survey?

Experiment design

Each experiment had a slightly different setup. More details will be given about each one. In total there were over 1,000 simulations (chart shown below).

### Results

**Experiment 1: Speed to Fill**

**Description**

A simulation of 10 uncorrelated surveys of varying incidence. Each survey had a quota of 300 respondents, and after the quota was filled, no more respondents were sent to the survey.

For each survey in each simulation, record was kept of the number of respondents entering the router before the survey filled. This provides a measure of relative speed to fill for each router configuration.

**Results—Speed to fill: first survey**

The following figure (shown on this page) is a plot by router type of the number of respondents entering the router before the first survey filled. The overall trend is visible in the cluster of points, but it is easier to see the trend by averaging across all of the simulations (the plot on the top of the next page). The remaining results in the paper will be reported as averages of all the simulations.

In this experiment, the random router is slower to fill—three times as many respondents entered the router before the first survey fills as compared to the priority router.

---

<table>
<thead>
<tr>
<th>Experiment</th>
<th>Surveys</th>
<th>Incidence</th>
<th>Quotas</th>
<th>Simulations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speed to fill</td>
<td>10 uncorrelated surveys</td>
<td>varying</td>
<td>yes</td>
<td>144</td>
</tr>
<tr>
<td>Correlation between survey</td>
<td>2 surveys, varying</td>
<td>20%</td>
<td>no</td>
<td>180</td>
</tr>
<tr>
<td>criteria</td>
<td>correlation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority placement</td>
<td>10 uncorrelated surveys</td>
<td>varying</td>
<td>yes</td>
<td>144</td>
</tr>
<tr>
<td>Number of concurrent surveys</td>
<td>2-9 uncorrelated surveys</td>
<td>varying</td>
<td>yes</td>
<td>576</td>
</tr>
<tr>
<td>in router</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Survey impact</td>
<td>30 “surveys” based on</td>
<td>–</td>
<td>–</td>
<td>tracker data</td>
</tr>
<tr>
<td></td>
<td>tracker data</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
However, in some situations, it may be equally important to fill all of the surveys... examining the number of respondents required to fill all of the surveys, the priority router still has a slight advantage, but the two are almost equal.

Experiment 2: Correlation between survey criteria

Description
This experiment was designed to examine one of the potential drivers of selection bias within the routing process—the correlation between the survey criteria.

This experiment is somewhat conceptual or explanatory in nature because it is set up with two surveys that run forever with no quotas. Each of these two surveys has the same incidence (20%), and the change between various simulations is the correlation between the two surveys.

After each simulation, the selection bias experienced by each survey is calculated.

Results—Selection bias of routing process by correlation between survey criteria

In a completely random router, there is no priority, but the bias in the random router is included here as a reference.

The first priority survey is much different from the other surveys in that it has no bias. The lower priority surveys have more bias, but the bias reaches a plateau early, around the second or third survey. With more simulations for this experiment the shape of this curve could be more clearly defined.
Experiment 4: Number of concurrently active surveys

Description
Simulation of between two and nine uncorrelated surveys of varying incidence. Each survey had a quota of 300 respondents, and after the quota was filled, no more respondents were sent to the survey. There were 576 simulations for this experiment.

After each simulation, the maximum selection bias experienced by each survey is calculated.

Results—Selection bias of routing process by number of concurrently active surveys

As more surveys are added to the router, the selection bias in the routing process increases, but after the first few surveys, the marginal impact of adding one more survey is really small. With more simulations for this experiment the shape of this curve could be more clearly defined.

As in the other simulations, the random router has less selection bias than the priority router.

Experiment 5: Survey impact

Description
As previously mentioned, the survey impact experiment was not a complete simulation. Tracker data\(^4\) was used to have a realistic data set that could be used to estimate impact of routing on survey questions.

- Tracker data is from an ongoing syndicated media usage tracker
- Certain questions within the tracker were used to represent 30 sets of survey qualification criteria over a wide range of criteria—device ownership, media behavior, product purchase, product usage, etc.
- Other questions within the tracker were used to represent survey “questions”

Although 30 virtual “surveys” were examined, results are only included here for one comparison.

Results—Survey impact

The effect that selection bias in the routing process has on measures in the survey will depend on how closely related the other survey’s criteria is to the survey question.

If a survey experiences a bias of 0.2 (e.g., 20% less music video watchers in the study than in the incoming traffic), the effect seen in the survey would differ depending on what question is being asked.

A question gauging interest in a music video service would be much more at risk since this question is correlated to music video watching—in this analysis a 20% reduction in music video watchers could produce an 8% change on the question within the survey. A question about live sporting events is much less at risk, since it is not very correlated with music video watching. In this analysis, we see less than a 1% change.

Review of Experiment Findings

- The priority router has an advantage on speed to fill, especially when it comes to filling the first survey.
- The completely random algorithm produces less selection bias than prioritization.
- Correlation between survey criteria is an important driver of selection bias in the routing process.
- Decreasing priority in the router doesn’t have much effect on selection bias after priority number 1 or 2.
- Adding each additional concurrent survey to the router has minimal impact on maximum selection bias after the first 4 or 5 surveys.

\(^4\)Longitudinal Media Tracking data (LMX): OTX
Implications

Router configuration

There are many different methods for implementing routers. This research only tested the two simplest router configurations (random and priority algorithms), but the simulation results show that these two different implementations yield different operational results: different efficiency and potential bias. One should take care not to over-generalize our results, since it is based on tests of just two router configurations. However, a couple of configuration recommendations at this point:

- Proceed with care when defining the routing algorithm: using priority can indeed help fill certain studies faster, but randomization helps reduce bias.
- Configure your router so that it is possible to measure bias. We have termed this configuration “simultaneous screening.” What we mean by simultaneous screening is a specific router configuration where incoming respondents are exposed to the screening questions from all or some of the surveys in consideration for routing before doing the allocation to one particular survey. By exposing the respondent to those screening questions in what is essentially an experimental design embedded within the routing process, it allows the calculation of selection bias in an operational router setting—without this special configuration, the bias would remain invisible.

Operational recommendations

At the survey level, when a survey is considered for a router, we also suggest the following survey tactics:

- Measure and monitor bias (see configuration implications in previous paragraph)
- Control with quotas when predictable—bias which can be predicted can also be controlled at the survey level with quotas. Obviously, age and gender quotas need to be set up. But this is also valid beyond basic demographics. In the previous example, you can create a quota of non-“music video watchers” for an online TV study if you are afraid that their under-representation might drive some bias.

- Consider survey clusters. Survey clusters are groups of surveys that are taken into consideration before routing. Some examples:
  - A cluster of continuous trackers that each has quotas on the same time frame (daily, weekly, etc.)
  - Clusters of surveys formed with criteria of low correlation between survey qualifications
  - A cluster of surveys that all have identical qualification criteria
  - Standardize screeners

Further implications

Similar biases also affect sampling in Access Panels. We expect to see similar types of bias in any case where you have a finite pool of respondents and past participation rules. This would suggest that more transparency is needed too to assess sampling rules and algorithms used by sample vendors.

Further research needed

To our knowledge, this paper is the first to address this category of systematic sampling error. More research is needed to better understand potential selection biases within routing processes. Other potential contributors to selection bias within routing processes will need to be examined. Alternative summary measures to the maximum selection bias can also be evaluated. The framework introduced in this paper can be used to evaluate other routing techniques to better understand the pros and cons of different possible configurations. In order to demonstrate the wide variety of routing configurations possible, we have brainstormed a short list of a few potential router configuration options that could be studied.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algorithm</td>
<td>Random, priority, hybrid</td>
</tr>
<tr>
<td>Screening questions</td>
<td>Actual questions or yes/no statements</td>
</tr>
<tr>
<td>Re-assignment</td>
<td>No, limited, unlimited</td>
</tr>
<tr>
<td>Maximum completes</td>
<td>1, 5, unlimited</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Yes, no</td>
</tr>
<tr>
<td>Screening mode</td>
<td>Simultaneous or sequential</td>
</tr>
</tbody>
</table>
All of the configurations tested in this paper allowed re-allocation, so the selection bias in the routing process we measured might better be termed “re-allocation bias.” Testing other router configurations would allow us to determine how this phenomenon generalizes to other types of routing processes.

For simplicity, all of our simulations assume that 100% of the traffic to each survey is sourced from untargeted sample that has been directed to the survey via a routing process. In practice, sample to surveys is often multi-sourced so a portion of the traffic is delivered via a router and a portion is recruited directly to the survey. The practical impact of selection bias in a router could be more realistically simulated if cases with this type of multi-sourced sampling design were included.

Other quality measures also need to be studied, such as respondent dishonesty on qualifying questions, overlap and de-duplication. Also, if implemented properly, can the “clutter” from presenting screeners for multiple surveys be used to reduce problems from respondents attempting to “game” system by giving whatever answer necessary to qualify?

This research was limited to measuring the systematic bias introduced after “untargeted” respondents enter a router. In reality, respondents entering a router generally reflect a convenience sample that has already undergone a selection process in the form of recruitment from any number of different sources or combination of sources on the web. Although this research has quantified the bias introduced after entering a router, it could be argued that this research does not answer the question of how survey results in a router compare to the actual distribution of characteristics within a population. In order to compare results from surveys within various router configurations to actual distributions within a target population, it would be necessary to test cases where the distribution of characteristics in the target population was known.

And finally, similar simulation experiments could be used to make more general evaluations about how other methodologies can deal with concurrent sampling, and the impact of different sampling algorithms on sampling error.
ABOUT THE AUTHORS

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Scott is Executive Director, Marketing Science and Innovation at Ipsos Open Thinking Exchange and is responsible for developing customized techniques to model the way in which consumers relate with brands and media. Scott has experience with diverse approaches to market analysis, including survey research, data mining of marketing activity and purchase trends, analysis of messaging content, and psychometric analysis. Prior to Ipsos Open Thinking Exchange, Scott worked as Senior Consultant for Entertainment Business Group and as Manager of Research and Development for Ivy West Educational Services. He has an M.B.A. from the UCLA Anderson School of Management.

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The following conferences have been scheduled. Stay tuned for details on other events.

ONLINE RESEARCH CONFERENCE – March 3-4, Las Vegas
The fourth edition of this conference (previously named Panel Conference) will again provide a needed forum for market research industry leaders to come together to share objective research, discuss viable conclusions, and formulate appropriate next steps to improve the quality and ensure the future viability of online research.

REGISTRATION FEE (On-site/Off-site): Members: $895/$1,095; Non Members: $1,395/$1,595
EXHIBIT FEES (includes 1 registration): CASRO Members: $2,450; Non Members: $2,950

MANAGEMENT CONFERENCE – May, Chicago (Date TBA)
This conference will focus on issues critical to managing your research business. Seasoned industry executives and business consultants will provide expert perspectives on managing departments and entire organizations.

REGISTRATION FEE: Members: $795/$995; Non Members: $1,095/$1,295

TECHNOLOGY CONFERENCE – June 2-3, New York City
Addressing an industry-wide need to better understand technology and its application to research, CASRO each year challenges the industry’s thought leaders to provide presentations that address key issues. The annual “Call for Papers” for this conference results in many excellent submissions. Recent conference topics include social media, mobile research, and advanced data analysis.

REGISTRATION FEE: Members: $895/$1,095; Non Members: $1,395/$1,595
EXHIBIT FEES (includes 1 registration): CASRO Members: $2,850; Non Members: $3,250

ANNUAL CONFERENCE – October 17-20, The Breakers, Palm Beach, FL
Always a must-attend on market research calendars, this event provides a unique opportunity for chief executives from companies large and small to discuss key industry and business management issues during three days in a premier facility. This conference provides supreme value as numerous meals, receptions and giveaways are included.

REGISTRATION FEES: Members: $995 Early Bird; $1,195/$1,495 Regular Rate
Non Members: $1,495/$1,795
EXHIBIT FEES (includes 1 registration): CASRO Members: $3,500; Non Members: $4,500

Email art@casro.org regarding sponsorship opportunities at these events.
For decades, market research firms have hit the streets to talk to consumers about their purchasing patterns, but New Orleans-based The Olinger Group has moved this time-tested interviewing style into the 21st century. When the firm was approached by mega mall-owner General Growth Properties to conduct in-person interviews at more than 130 properties across the country, we knew we had the chance to do something different. The proposal called for paper and pencil surveys, but we thought they could be conducted with iPhones. As the release date for Apple’s new iPad tablet computer equipped with wireless 3G data service approached, we realized the new devices would be a better fit than the smaller iPhones. With an iPad, interviewers can show survey questions to respondents. The large, clear display is perfect for clearly communicating questions and scales.

The first major hurdle for getting the project off the ground was finding enough iPads. Since they were brand-new, the devices were in short supply. We worked with sales representatives at a local Apple store to eventually amass a stockpile of iPads. The next challenge was finding dozens of interviewers to conduct surveys at malls from coast to coast. We wanted to make sure data collectors were not only personable and friendly—but with thousands of dollars in equipment in the field, interviewers needed to be trustworthy. Facing a tight deadline, our employees quickly tracked down friends and family members across the country. One referral led to another and soon a team of field project managers was formed, who then hired their own friends and family members to fill the four interviewer slots at each mall. Eventually, more than 570 interviewers were hired for the project. Once those teams
were assembled, each team leader was trained through phone calls and instructional videos on how to use the iPad and how to conduct surveys.

The iPad’s novelty definitely helped shoppers warm-up to interviewers, but the advantages go beyond the “cool” factor. By making questions and responses visible, the iPad provided the benefit of allowing the respondents to read questions and answers, while also interacting with an interviewer who provided guidance. When interviewers were out in the field conducting surveys, employees at our headquarters in New Orleans could track every action in real-time. “We could see everything,” says Research Analyst Megan Holstine. “I can download the data and see how many surveys per hour they’ve completed.” Employees used instant message features to let interviewers know if they were meeting goals or needed to pick up the pace. Interviewers could also message back to project managers if they had questions about surveys. Field project managers could easily track the progress of their teams through the iPad.

Apple’s MobileMe tracking service allowed us to pinpoint the location of all iPads—which came in especially handy when one device was stolen. Interviewers notified us of the crime, and project managers were able to track the thief’s movement across nearby streets and into a park. When the iPad stopped moving, police were able to recover it—and dust it for finger prints. During this entire situation, client data was safe and secure on our server—not the iPad. The device was also remotely locked when it was reported stolen. The client really appreciated the fact that survey data was never compromised. Everything was backed up and completely secured. The iPad system also helped streamline the project once data was being analyzed. “By reducing the amount of error from interviewers and respondents, we received better data quality,” says Holstine. With constant in-field monitoring, data could be checked throughout the survey process, and any problems that arose could be addressed while interviewers were still at survey sites.

Over the course of the summer weeks, we conducted over 140,000 individual interviews at more than 130 malls. With an extremely successful real-world test of the iPad’s capabilities now complete, we are looking for more opportunities to use the device to quickly and securely collect data in the field for a wide range of clients.

ABOUT THE AUTHOR

Jude Olinger

Jude founded The Olinger Group with a desire to bring innovative state-of-the-art research solutions to his clients. His more than 20 years of market research experience and being surrounded by a team of experts affords him the opportunity to work with clients in a variety of industries, offering them a complete array of design, analysis, and methodological tools appropriate to their unique business needs. Jude is active in numerous professional market research organizations and, as a spokesperson for the industry, has been quoted in The Wall Street Journal, Travel Counselor, and other publications. Jude recently completed two terms as President of the Entrepreneurs’ Organization (EO) New Orleans Chapter and currently serves as EO’s Accelerator Program Chair (New Orleans). He was elected Secretary of CASRO’s Board in October, 2010.
Privacy, Tracking Applications, Pharma Research Among Key Legislative Issues in 2010

From CASRO’s General Counsel

by Duane Berlin and Russell Anderson of Lev & Berlin, P.C.

This has been an important year for legislative and governmental affairs with a number of major developments for the research industry. For the first time, the U.S. House of Representatives is considering passage of comprehensive privacy legislation. Further, earlier this year the federal government enacted a national pharmaceutical marketing statute as part of the broader health care reform effort. Both of these pieces of legislation may greatly lessen the confusion caused by the current patchwork of state and federal laws on each topic. In addition, Minnesota’s Board of Pharmacy materially clarified its regulations, which now explicitly permit payments to physicians as part of market research. Lastly, we find notable the spread in the research industry of various technologies used to track computer usage and update the latest risks with respect to the use of such technologies. This article is designed solely to give a brief update on each topic. For further information on any of these issues, please contact CASRO.

Federal Privacy Legislation

Earlier this summer, Congressman Bobby Rush introduced H.R. 5777, the “Best Practices Act of 2010,” (the “Rush Bill”) in the U.S. House of Representatives. The Rush Bill, if enacted, would create an overarching federal privacy regime in the United States for the first time. We believe that the net impact of the Rush Bill will be positive for the research industry by 1) aligning U.S. law with the approach taken in the rest of the industrialized world, and 2) providing greater clarity through its preemption of the many state laws that regulate the privacy and security of personal information. Research companies should be able to comply with the requirements that would be imposed by the Rush Bill with minimum additional effort.

The Rush Bill follows the EU Data Privacy Directive model in many key respects and accordingly requires that companies follow the principles of notice, choice, onward transfer, access, security and data integrity. Companies that are already compliant with the US Department of Commerce’s EU Safe Harbor program should readily be able to comply with the provisions of the Rush Bill. Perhaps most notably for the research industry, the Rush Bill will mandate that companies create and post a privacy policy and that explicit consent be received from data subjects, such as survey respondents, before sensitive information, such as ethnicity, sexual preference or financial information can be collected, used or disclosed to any third party.

The FTC and each state’s Attorney General will be principally responsible for enforcement of the Rush Bill. In addition, the Bill provides a private cause of action for individuals.
Participation in an industry-sponsored, self regulatory “Choice” program will provide a safe harbor from private causes of action as well as exemptions from certain consent and access rules.

**Flash Cookies and Tracking Applications**

Recently, two class action lawsuits were filed over the use of “locally shared objects,” colloquially known as “flash cookies,” against major third party Internet network advertisers, Quantcast and Clearspring, as well as several well-known websites that served their ads. While web developers have used flash cookies since 2005, their use has become sufficiently widespread now to be a common part the experience of general web users.

Like traditional HTML cookies, flash cookies are used to track users and store information about them. Unlike traditional cookies, flash cookies base their existence within Adobe’s Flash application, and offer a number of advantages (from the web developer’s perspective) over HTML cookies. Flash cookies can be larger, do not expire and are not stored within a browser, and therefore are not deleted when a user chooses to delete all cookies using the browser’s privacy functions. In addition, flash cookies can be used to “re-spawn” or restore traditional HTML cookies upon their deletion.

From a legal perspective, the use of flash cookies presents a number of risks, including an FTC enforcement action (Adobe has asked the FTC to get involved on this issue), a regulatory action in the EU and a private lawsuit, such as the Quantcast and Clearspring suits mentioned earlier. This would be a very good time to 1) learn whether your company uses flash cookies and what those flash cookies are designed to do, 2) ensure that any flash cookies your company uses do not “re-spawn” traditional HTML cookies; and 3) if your company’s website uses flash cookies, update your company’s privacy policy to disclose their use (including instructions on how to delete them).

Along a similar vein, we have found that a number of market research companies are either already employing or currently considering employing software, including HTML cookies, flash cookies or other technologies, that track a user’s internet browsing or computer usage more generally. Just in the past week another class action lawsuit was filed against a technology company called Ringleader and several ad networks and web sites that were using an HTML5 application developed by Ringleader to track users’ web browsing on mobile phones. The Rush Bill, described above, would codify the existing FTC (and CASRO Code) requirement that an explicit opt-in be received before using hardware or software that would monitor all or substantially all of a subject’s browsing or computer activity. Most notably, the FTC requires the opt-in be made only after the subject is given an extremely detailed notice that is separately provided from a generic privacy policy or terms and conditions.

**Pharmaceutical Marketing Statutes**

There have been significant developments in 2010 with respect to pharmaceutical marketing statutes that require pharmaceutical and medical device manufacturers to disclose “payments or other transfers of value” to physicians and hospitals.

On March 23, 2010, the well-publicized federal health care reform bill, the “Patient Protection and Affordable Care Act,” was signed into law, and included within it was the formerly stand-alone bill, the “Physician Payment Sunshine Act” (the “Federal Sunshine Act”). The Federal Sunshine Act resembles a number of proposed and enacted state statutes that require pharmaceutical and medical device manufacturers to disclose “payments or other transfers of value” to physicians and hospitals.

Thanks to extensive lobbying efforts on behalf of the research industry, led by PMRG with support and participation from CASRO and other trade groups, the Federal Sunshine Act’s definition of a “payment or other transfer of value,” that would trigger the reporting requirement in the statute, explicitly does not include payments made to physicians for their participation in research, as long as the payments are made indirectly “through a third party” (the research organization) and the pharmaceutical client “is unaware of the identity” of the research respondent. Consequently, in the case of survey research, no disclosure would be required where a fair market value payment from
a research company is made to physicians in connection with their participation in survey research, and the research client does not know who the respondent is.

After January 1, 2012, the Federal Sunshine Act will pre-empt any state statute or regulation that mandates that a manufacturer disclose or report the types of information required to be disclosed by the Federal Sunshine Act. The preemption would not, on its face, apply to state statutes that completely prohibit such payments to physicians or that require additional disclosures beyond those required by the Federal Sunshine Act.

Also, earlier this year, after substantial lobbying by CASRO, PMRG and MRA, the Minnesota Board of Pharmacy reversed its earlier prohibition on payments for participation in market research and has updated its guidance to provide that “bona fide market research” conducted by independent survey research organizations constitutes a “genuine research project.” Pharmaceutical market research in which Minnesota health care practitioners are compensated to participate as confidential respondents is now both permitted and not covered by the disclosure requirements for payments made by manufacturers and wholesalers, because the practitioner is unidentified to the pharmaceutical company and is compensated directly by the independent research organization.

Current states where payments made to doctors, hospitals and other health care professionals for survey research are permissible, but subject to state reporting requirements include: the District of Columbia, Maine and Vermont. Massachusetts does not require reporting for double blind research, but otherwise may require disclosure. A number of states are currently considering pharmaceutical marketing statutes that may impact market research, including Alaska, Arizona, Hawaii, New York and Ohio. CASRO will continue to monitor the movement of these statutes and bills and take steps to mitigate any effects on the research industry.

Through the CASRO General Counsel and Government & Public Affairs Committee, member companies receive legal advice on complex compliance and contractual issues; important updates on legislation impacting the industry, and extensive industry lobbying efforts.

Attorneys employed by and representing CASRO member companies meet periodically at the CASRO General Counsel Forum. Here they have the unique opportunity to discuss myriad legal issues they currently face and strategize for what may emerge. Please contact CASRO for details on participating.
ABOUT THE AUTHORS

Duane Berlin
Duane is a leading authority on legal issues affecting the survey research industry, having represented research companies for his entire 25-year career. Duane has served as legal counsel to CASRO for the past 11 years, is the principal author of CASRO’s Privacy Protection Program, which includes CASRO’s Model Forms of Survey Research Agreements. He is also the editor of CASRO Comments “Legal Update.” Duane also currently provides private legal counsel to many leading research firms with respect to commercial, corporate and privacy matters and speaks frequently on legal and regulatory issues affecting the survey research industry.

Russell Anderson
Russ is an attorney with the firm of Lev & Berlin, P.C., and together with General Counsel Duane L. Berlin, is part of CASRO’s legal team. Russ is an expert in the laws and regulations governing the market research industry, including privacy, data security and technology law. Together with Duane, Russ routinely drafts and negotiates contracts and agreements for many leading market survey research firms. Russ also has an extensive practice in corporate and securities laws. Russ is a graduate of the College of William and Mary Law School and Wesleyan University.
As market researchers, respondents are our most valuable assets. The SSI QUEST (Questionnaire Experience Satisfaction Tool) Awards honor those forward-thinking companies whose creativity and excellence in survey design led to the most engaging research experiences for respondents around the world. This recognition of our winners’ outstanding performance is not based on our opinions but on the self-reported scores of our industry’s most important shared resource—our research participants.

Please join SSI in congratulating the companies who are leading the way in the research community’s ongoing quest for the optimal survey experience. We applaud their mastery of survey creation—and their commitment to respondent satisfaction.

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How Can I Better Leverage My Company’s CASRO Membership?

A Checklist to Optimize ROI

With Clients...
- Have I fully updated our company’s listing on CASRO’s online member directory so that clients can find my company when looking for a particular service, market served or location?
- Have I included the CASRO logo and/or the CASRO Seal of Integrity on my website, e-mail signature, marketing materials, etc. so that clients are aware of our commitment to conducting research the right way?

With Respondents...
- Have I included the CASRO logo and/or the CASRO Seal of Integrity on my surveys and website so that respondents learn about the CASRO Code of Standards and have assurance that we are a legitimate, ethical research company?

With My Employees...
- Do all of my staff members know about our company’s CASRO membership and the CASRO Code of Standards & Ethics to which our company must abide?
- Have I included relevant staff members on CASRO mailing lists so that they remain up to date on industry issues that concern their jobs such as human resources, legal, privacy, financial?
- Have I sent my staff to relevant CASRO conferences to increase their knowledge base?

Through Networking...
- Have I registered for the CASRO Annual Conference so that I can connect with C-suite research industry colleagues in a non-competitive forum?
- Have I looked into exhibiting, if appropriate, at any of the CASRO conferences to increase my business with like-minded research organizations?

By Protecting My Business Interests...
- Have I kept up to date with CASRO efforts to protect our industry from harmful legislation and promulgation of self regulation and apprised staff on CASRO Government & Public Affairs briefings?
- Have I turned to CASRO for assistance on legal or contractual issues?
- Have I participated and reviewed CASRO’s financial and compensation survey data to improve my planning and budgeting?
- For my international interests, have I taken advantage of credentials such as safe harbor and CASRO ISO certification via CIRQ?
The final session at this year’s CASRO Annual Conference peered under the hood of what’s changing in the client world and celebrated the role of research in key strategic decisions and initiatives. It was an electrifying session, at the same time worrying and full of hope.

I opened the session with a review of what is changing in the client world and what it meant for research in the future. I identified five themes of change:

1. **Doing More With Less** – 80% of research and consumer insight departments are working with less budget today than they were two years ago. And yet, they are being asked to do more—and more that is strategically vital to their organizations.

2. **Do It Yourself Research** – increased reliance not only on DIY data collection systems but also on proprietary panels and communities, in many cases cutting out the intermediation of full service research.

3. **Research Transformation and New Modalities** – The ARF has started to lead the transformation of market research with its Research Transformation Super Council. Much of this is centered around all the new modalities that are available to researchers—communities, online ethnography, neurosciences, biometrics, web analytics and others—and how to weave these into the fabric of providing insights for strategic impact.

4. **The River** – the concept of the modern world of information as a major river with thousands of tributaries. The idea here is that corporations in the future, when they have a business issue, will fish the river for information before turning to traditional market research for further explanation or clarification. This may have fundamental implications for the position of research as we know it in the corporate information ecosystem.

5. **Pay for Performance** – the announcement by Coca Cola at the AMA Conference that it is moving to a pay-for-performance model of remunerating research partners caused not a little interest and concern. Is this a threat or an opportunity—or both?

These themes were then wonderfully illustrated by two client papers from Ford and Hewlett Packard. Bill Neafsey of Ford spoke directly to the power of research to influence strategic decisions while doing more with less. Bill is in charge of Ford’s global segmentation program—he is, in his own words, a team of one in a team of eight. That’s right—the mighty Ford research department of over 160 people that some of us knew in the 1990s is now a team of just eight. And yet, the future of the company depended on Bill and his colleagues to lead...
them in the right strategic direction through brand and product development guidance enabled by segmentation. The fact that their segmentation was embedded into every decision Ford took where product was concerned meant that, while their competitors took refuge in bankruptcy, Ford was able to hit home runs in the products that they brought to market and gain significant share. Heady stuff!

Satjiv Chahil, SVP of Global Marketing at HP, then took his audience through an electrifying presentation that left all of us gasping, but the females among us especially so. Brought into HP from Apple at a time that analysts were writing off the PC arena as a commodity market, Chahil utilized powerful ethnographic techniques to prove that, actually, the relationship that people had with their PC/laptop was extremely personal. More than that, they were able to prove that PC makers as a whole were ignoring segments for whom the relationship was intense—namely teens and women. All through this process, HP utilized ethnography, creative qualitative and co-creation as a way to bring to market products that grabbed potential customers emotionally as well as functionally. They also used powerful story-telling techniques to get these themes through to HP’s Board.

Without giving the game away, HP took what they had learned and, for the female market, turned to fashion designer Victoria Kamm to design a clutch-sized laptop for women, which was then launched on the fashion runways of the world. The product was an instant success and was part of HP’s success in gaining the Number One slot in the global PC market.

When Chahil unveiled the next season’s variant of this laptop—encrusted in Chinese enamel decoration—several female voices in the audience were to be heard chorusing “I want one!”.

This session was ultimately immensely uplifting as it reaffirmed how integrally important our profession is to success while at the same time pointing the way to a new definition of what research is and can be.

ABOUT THE AUTHOR

Simon Chadwick

Before starting Cambiar, Simon Chadwick was Global CEO of NOP World, a $400 million market research and consulting company. In this role, he was responsible for creating a cohesive global group out of nine highly distinctive and successful research companies in the UK, U.S., Europe and Asia. Before joining NOP, Simon ran a number of research, consulting and CRM companies within the WPP Group, including The Winona Group, Research International USA, Research International UK and Research International Italia. Simon is active in the leadership of the market research and marketing industries; he was 2004 Chair of CASRO and was a member of the Board of Trustees of the Marketing Science Institute. He has been a member of the Board of Advisors of the MSMR (Master’s in Market Research) program at the University of Texas Arlington and is a Fellow of the Market Research Society. He holds an M.A. in philosophy, politics and economics from Oxford University, England and has done post-graduate studies at both Columbia and Harvard business schools in Change Management and Strategic Management. In addition to his role at Cambiar, Simon is also Editor-in-Chief of the magazine Research World.
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