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As market researchers, the service you provide by its very nature is an argument for change. Very seldom does your research indicate that there is no need to change. So, you and your organization are clearly in the language of change management and are, in fact, agents of change. That data you provide should be enough...it is the argument for change and those receiving it should, thus, change. I don’t have to tell you, however, that that is not the way it works. People have an incredible ability to resist the data or, having accepted it, still refuse to make the changes the data calls for.

The reasons for this resistance are actually very logical when we look at the change from the perspective of the people who need to make these changes: the targets of change.

When people find it difficult to change it is usually for some combination of the following reasons:

1. They don’t want to change from the way they do things now because they are comfortable doing it that way. They get recognition, have power, don’t have to exert themselves too much
2. They don’t want to change to what management is recommending because they don’t see any value in doing it that way for themselves, it is not the change they wanted to make, they fear that they will not be as valued
3. They don’t want to go through the effort of getting to the new way. They have work to do and can’t exert the extra energy required to change
4. They don’t trust the leadership’s ability to get them to the new way
5. They don’t trust the Project Team’s ability to get them to the new way
6. They have been there and done that before and don’t believe it will be any more successful this time than the last time...or, if it is successful, the way it will be done is too painful
While all these reactions are natural and normal they are also the reasons why changes don’t happen. If change is your business, then managing that change is part of it as well. How do you help people to overcome their issues and make the choice to change?

**Three ways:**

1. Give them the information they need to understand why they can’t keep on doing things the old way. Make the messages as much about them as about the organization.
   - a. What happens to our organization if we don’t change?
   - b. What will happen to me (obsolete skills, lack of promotability, even no longer being required because business takes a dive)?
   - c. So how long can we keep doing things the old way?

2. Don’t just describe the organization when the change is completed. Tell them what their jobs will be like. How they will do their work. How they will look when they are successful.

3. The data may have convinced them of the need to change and they may even like what will be the new way but many won’t sign up because making the change is too hard. So show them how the implementation will be done and what will be provided to support them through the ‘delta’ of the change.

Of course leadership plays a key role in the change management process. However, leaders themselves are often the targets of change and have the same issues and concerns as their employees. So they need the same support. But they also are the support. They are the ones who need to share the information about the change with their people. They need to give them the time to go to training, to become skilled at using the new technology or following the new process. They need to be effective sponsors of change.

The people impacted also have an active role to play. They need to be thoughtful about what their issues are, why they are feeling resistance and what they need to help them get through the change process.

Everyone who is a player in a change has a role. When they all get good at it, your recommendations are implemented faster and more effectively. And that makes you successful.

---

**Jeanenne LaMarsh**

Jeanenne was the founder and CEO of the original LaMarsh & Associates, Inc. She is internationally recognized as an expert in helping companies to implement successful change. She works with senior management, key change agents, and people who need to change; helping them to understand change and build effective change management strategies. Her company’s client list includes Ford, Sony Pictures, Whirlpool, Chevron, Allstate Insurance, TIAA-CREF, Honeywell, Kellogg, Motorola, Walgreens, eBay, Nielsen, Caterpillar, Northrop Grumman and many more.

Jeanenne’s latest book is: *Change Better: Survive—and Thrive—During Change at Work and Throughout Life*. She can be reached at jlamash@lamash.com or 312-464-1349. www.lamash.com
Using Tablet Computers
For “Intentional” Mobile Research

By John Seal, Senior Vice President, Burke, Inc.


This year, the CASRO Technology Conference will take place in NYC, May 29-30, 2013.

“Unintentional” vs. “Intentional”
Mobile Data Collection

Much has been made of the emerging challenges of mobile data collection. Most of these concerns refer to what we might call “unintentional” mobile data collection: A survey designed to be viewed on a full-sized computer monitor and completed with a full-sized keyboard is completed via a mobile device, typically a smartphone, for which it was not optimized. Furthermore, some respondents may complete the survey while in public spaces where distractions prevent them from giving the task their full attention. While not ideal from the researcher’s perspective, efforts to restrict such mobile data collection can lead to reduced incidence or biased samples.

However, there are other instances in which mobile data collection can be considered “intentional,” and beneficial to the research effort. Sometimes researchers are served by capturing respondents’ opinions away from their homes and computers and “in the moment” when those opinions are formed or influencing their decisions. Examples might be when a consumer is at a store shelf considering which product to purchase, in an automotive showroom viewing new vehicles, or in a restaurant enjoying a meal.

Research conducted at such “in the moment” venues has actually been among the last types of research to make the transition to online data collection. When researchers need to catch respondents away from home as they are engaged in decision-making, or in experiences we want them to evaluate, we typically do not have reliable ways to capture representative samples.
in real time with online devices. So, standard practice for this sort of “mobile” research has been the most low-tech method possible: intercepting respondents we wish to interview and handing them a clipboard with a paper-and-pencil survey. In doing so, we forego the many benefits of online data collection:

- The opportunity to incorporate complex skip patterns and enriched stimuli such as video into surveys
- The cost savings as well as greater quality control that comes with less human interviewer involvement
- The cost, speed, and data quality benefits that accrue from having data immediately resident in electronic form, as soon as it is collected, without scanning or data entry

What the research community needs, then, for these “in the moment” situations, is research that is both mobile and online.

When consumers were asked to enter the price that they would expect to pay for the new menu item that they just tasted, they consistently gave a higher value if they were responding via tablet, rather than on a paper survey.

Moving Forward With “Intentional Mobile”

At Burke, we maintain an extensive practice screening and testing restaurant menu items. Because samples need to be drawn from the clientele of each restaurant chain, and because items must actually be prepared in the restaurant kitchen for respondents to taste as part of the survey process, in-restaurant intercepts are a natural and critical component of the design. However, we cannot expect customers entering the restaurant with lunch—no research—on their minds, to come equipped with an appropriate mobile device with internet connectivity, on which to complete our survey.

We have recently transitioned this research practice from paper-and-pencil surveys to data collection via online tablet computers. A key distinction between this research and that online research described as “unintentionally” mobile is that the device on which it is completed is supplied by the researcher rather than owned by the respondent. One benefit of providing the device is that the researcher can select the best device for the job. We elected to utilize tablets rather than the more widely-used smartphones, primarily because of their larger screens. However, there are drawbacks to supplying the device to respondents as well: Whenever you put an unfamiliar device in someone’s hands, there is risk in how he or she will adapt to it.

Upon our initial transition from paper to tablets for this research, we were pleased to observe that the number of significant differences in survey responses between the two methods (when a parallel test was conducted) were fewer than would be expected by chance. Consequently, we have confidently transitioned our in-restaurant surveys from paper to tablet in most cases. Moreover, we are comfortable evaluating results for new menu items relative to norms from our history of paper-and-pencil tests.

The Puzzle of Prices

However, there was one puzzling finding in these parallel tests. When consumers were asked to enter the price that they would expect to pay for the new menu item that they just tasted, they consistently gave a higher
We have confidently transitioned our in-restaurant surveys from paper to tablet in most cases. Moreover, we are comfortable evaluating results for new menu items relative to norms from our history of paper-and-pencil tests.

value if they were responding via tablet, rather than on a paper survey.

Evidence suggests that this difference stems from lack of familiarity with tablets, and is a consequence of providing the survey-taking devices to respondents, some of whom had never previously held or used a tablet. Figure 1 shows that the magnitude of the price inflation observed in our restaurant research tracks with the penetration of tablets in the population, and thus the likely familiarity of those in our research samples.

There are a number of ways in which being asked to use an unfamiliar device could potentially inflate price responses, in particular.

- New and cutting-edge technology—especially if it is unfamiliar—communicates a more premium environment and experience, which can influence consumers intuitively or subconsciously to expect to pay more.

- Individuals may not be familiar with using the tablet interface, such as how to navigate the touchscreen. Those issues are magnified when entering a price, because unlike the rating scale questions that make up the majority of our research questionnaires and can be answered with a simple touch, entering a numeric price value requires touching within an answer box to activate a “pop-up” numeric keypad.

- Lack of familiarity with the interface can lead to attention being diverted away from the product respondents are being asked to rate, as they concentrate on figuring out just how to go about entering their responses. Less-focused attention can lead to more random responses. Unlike 10-point rating scales, price questions are theoretically unbounded (on the high end). A respondent cannot give a price below $0, but there is no upper limit to the price that can be given. Responding randomly to unbounded scales tends to result in greater variation between individuals (as measured by the standard deviation) and as a direct mathematical consequence, higher average ratings (since it is on the high end that the scale is unbounded).

Evidence from Burke’s research supports these conclusions. Figure 2 reveals that the majority of the observed “price inflation” comes from those respondents we deemed “inexperienced” with tablets; those who self-reported that they had not previously seen or used a tablet. (Extreme outliers on the unbounded scales were removed but had little impact on the analysis.)

Already, paper- and tablet-based surveys produce similar results on most measures, and additional good news is that the few observed differences can be expected to diminish over time.
Further, Figure 3 supports the suggestion that these tablet-inexperienced survey respondents truly were responding more randomly. The standard deviations of their responses across nine different price tests were consistently greater than the corresponding standard deviations for the more tablet-experienced respondents, whose answers more closely resembled those of the consumers who completed the survey with the more-familiar, old-fashioned paper-and-pencil methodology.

The Good News

Familiarity with tablets is only going to continue to grow. Already, paper- and tablet-based surveys produce similar results on most measures, and additional good news is that the few observed differences can be expected to diminish over time. Until such time, the best advice is to rely on traditional rating scales in research of this type, and avoid numeric-entry items, especially prices, where possible.

Tablets have a key role in the future of “intentional” mobile research. They provide all the benefits of online research, offer a larger, more legible screen than smartphones, and are still small enough to maintain easy portability and a true “in the moment” research experience. As the use of mobile devices continues to grow in the general population, researchers must continue to learn how to optimize the survey experience for respondents using these newer devices and add to the collective body of knowledge available about this emerging research platform.

About the Author

John Seal

John has 20 years experience at Burke, designing and conducting research for a wide variety of clients in many industries. He currently serves as Burke’s chief methodologist and is a regular instructor at the Burke Institute. He is responsible for Burke’s analytical capabilities and specializes in research and development of the latest quantitative and technological methods for custom primary research. John has a degree in mathematics from Drake University and a Masters in psychology from the University of Michigan.
Practice Makes Perfect...or Not

By Greg Owen-Boger, VP and Trainer at Turpin Communication

Greg presented at the 2012 CASRO Management Conference (June 13-14 in Chicago). This year, the Management Conference will take place in New Orleans, April 24-25, 2013.

A lot of people will tell you to “practice, practice, practice” because “practice makes perfect.”

When it comes to presenting, this is some of the worst advice you can get or give.

Practicing a presentation cannot possibly lead to perfection.

Here’s why.

Effective presentations are not speeches (which I suppose could be perfected). They are conversations. Conversations by their very nature are imperfect. They involve other people and are therefore unpredictable. They twist and turn. They stop and start. They go back on themselves. They jump forward.

You can’t predict any of that. Therefore, practicing a presentation until it is perfected is a foolish exercise.

The desire to be perfect and the pressure of other people telling you that you can be (should be) perfect puts the bar too high. And here’s what happens:

• You put too much energy into reaching the bar
• Which leads to nervousness
• Which disengages you
• Which puts you in your head trying to recreate the script you etched into your brain during practice
• Which leads to a dull, lifeless, uninspiring meeting.

Hardly perfect.

Engagement Allows You to Manage the Give and Take of an Orderly Conversation.
It’s more than bad advice, though, it causes damage.

Strong words, I know. But I’ve worked with enough presenters to know that they drag around a lot of baggage from the bad advice and training they’ve received over the years. A lot of my job when coaching them is to undo the damage. I help people see things in a new way and I give them a new set of skills and techniques that will work uniquely for them.

If I were your coach

If we had the chance to work together, I’d start by asking you to redefine your next presentation as an “Orderly Conversation.” An orderly conversation is one that is carefully organized and flexibly executed.

When you think of presentations as orderly conversations, it changes how you think of (and use) your slides. They become thought starters that will trigger dialogue. They become support for the conversation rather than being the presentation. This new thinking will change the information you put on your slides and how you arrange it.

Let’s assume that your slides are complete and you feel that they will support the conversation you want to have. Now it’s time to review. Notice I said “review,” not practice. As you review your slides, look at each and grab a thought. That thought should launch the conversation you intended. If not, change it until it does.

As you think through each slide, avoid scripting yourself. Think of different ways of explaining each slide. Remember you’re not striving for perfection. You’re working toward flexibility.

Once the conversation begins, let loose and enjoy it. Trust that your slides will be there to support the conversation. Let it get a little messy, follow your listeners’ lead for a bit, bring it back around. You’ll be amazed at how much more fun presenting can be.

About the Author

Greg Owen-Boger, Vice President, Turpin Communication, Inc.

Schooled in management and the performing arts coupled with an entrepreneurial spirit, Greg brings a diverse set of skills and experiences to Turpin, a presentation and facilitation skills training company based in Chicago. He joined Turpin in 1995 as a cameraman and quickly worked his way up. He now serves as a communication trainer and coach for Turpin’s largest clients. When not working directly with clients or speaking at conferences, Greg oversees the development of Turpin’s eLearning and blended learning platforms. He also serves as the Director of Technology for the Chicagoland Chapter of the American Society of Training & Development (CCASTD). Turpin’s client list includes Wrigley, Cisco, The Chicago Mercantile Exchange, Grainger, Kraft, Northwestern University and many more.

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A McMILLION COMPANY
Let Gravity Be Your Guide: Advice for Accelerating Global Growth

By Doug Guion, President, The Pert Group

Doug presented at the 2012 CASRO Management Conference (June 13-14 in Chicago).
This year, the Management Conference will take place in New Orleans, April 24-25, 2013.

Former Secretary of the United Nations Kofi Annan once wisely remarked that “…arguing against globalization is like arguing against the laws of gravity.” This new and relentless law of nature has prompted a huge number of companies to consider whether they need an international presence to remain competitive. Simply having a “global strategy” isn’t enough to protect market share and provide customers with the confidence they need to remain loyal. If you’ve decided that to credibly operate internationally you need to open a new office, congratulations! Establishing a global office is an exciting step which can provide a wealth of new opportunities. However, let me also offer a word of warning. A new office doesn’t automatically open new doors. Planning for an expansion outside the United States brings a host of considerations wholly different from your previous experiences of opening regional branches.

The most important questions often arise after companies settle on the physical location for a new facility, and typically fall into three categories:

• How long will it take for us to establish legitimacy in the market?
• How can we minimize risk without hindering our growth goals?
• What staff do we need in place on both sides to ensure success?

While there is simply no way to completely remove risks, gaining clarity on how you plan to address each of these considerations helps keep risks to a minimum as you accelerate global growth.

How long will it take for us to establish ourselves in the market?

This is the question that typically dominates boardroom discussions concerning the future of a new operation. While it’s certainly important to have a vision for where your new office is heading, it can easily be misaligned with the uncertainties you will face during your first year in operation. This is particularly true if the vision is being framed by well-intentioned executives who may not have much, if any, experience operating in a foreign country. Unfortunately, in these cases the strategic reasoning used to set growth plans and performance expectations can be inherently flawed.

There is obviously no absolute prescription for success that is applicable in all cases, but my recommendation is this: be reasonable. When you’re going global, things take longer than they should. Failing to accept and discuss this at the senior level is an egocentric mistake that can and should be avoided. Statements like “we will be recognized as a global leader within a year” are foolish and completely unsupportable. This form of hubris not only erodes the credibility of your management prowess, but can easily set you up for failure. A rule of thumb I’ve found helpful is to assume the first year will be “set up” with years two and three being “ramp up.” In this way, your plan will account for the myriad of uncertainties you’ll encounter as you first get your office set up, and begin navigating the labyrinthine bureaucracies that exist across the globe.
Another common mistake is attempting to lure clients before the business is prepared to adequately demonstrate legitimacy. I’ve made this mistake myself, so I can tell you from experience that it’s unwise for a variety of reasons. Most importantly, it will quickly become obvious—through even cursory discussions—that your operation is still in a formative, rather than functional, state. Clients want the same thing you would want in their shoes—a clear investment in protecting their interest with an equal or greater demonstration of the ability to support your claims. Look at it this way: Would you move your belongings into a house that wasn’t built yet? Not likely. Insist that the service footprint be firmly established prior to making a large business development push in the new market.

**How can we minimize risk without hindering our growth goals?**

In this area, enlist professional help for both legal and tax matters straightaway. While you know the particulars of your business that need exploration, the following items should also be on your radar.

**Trademark Issues** – Currently, as an American business, you are able to operate in whatever state you want without fear of running into trademark issues. When you move to another country, however, it is quite likely that your brand name may not be readily available. If this proves to be the case, you’ll need to consider purchasing the trademark from the holding party or modifying the name by which you operate internationally. As there’s clearly a brand equity issue with the latter course, secure an experienced counsel early on for a global trademark search and have them provide the list of available options for the countries under consideration. This helps you avoid being caught off guard down the road and removes the specter of a surprise lawsuit!

**Regulatory Issues** – There are many detailed books devoted to this subject, so I’ll simply share an illustrative example. When opening a business in the UK, as The Pert Group did in 2011, it’s a statutory requirement that if the parent company is greater than a certain size (roughly $5 million USD), then a global audit must be performed annually on the entire business regardless of the size of the UK-based office. When we were opening our London office, there was a lot of confusion as to whether or not we would be required to perform this expensive audit, even though we clearly exceeded the revenue threshold. As we discovered six months later, when in doubt, it’s best to go ahead and budget for these potential expenses since we wound up having to foot the bill for the audit. Learn from our experience. Plan for surprises.

**Immigration** – You can find a number of service companies that offer immigration guidance and I strongly recommend you secure one. There are few areas with more counterintuitive pathways than the immigration superhighway, and if you get off on the wrong exit you can be in for really long delays. These service companies can help advise you on who from the parent office can work at your new location, get the
appropriate visas, and sometimes fast-track requests through the system. The costs for these services are usually quite nominal relative to the overall budget. I’ve found the services invaluable when moving people around the world.

**Accounting/Bookkeeping** – The importance of doing things properly in this area cannot be overstated. If this is the first international office for your company, you will have new questions to answer which will require professional guidance. Handling intercompany transfer pricing, managing capitalization requirements, etc., are not items that are intuitive or can be put off for too long. You could choose to enlist the help of a major accounting firm for this guidance or simply have your legal counsel provide options for consideration. The Pert Group saved significant dollars by choosing a local agency to handle payroll and basic accounting functions rather than using the major payroll processing firm who services our domestic business. In one case, the initial quote received from our current payroll company seemed extremely reasonable until we got one from a local agency that was 10 times cheaper! The agency has been great to work with and is as every bit as professional without requiring us to needlessly pay extra for a brand name.

**Physical Location** – You can ease into a foreign locale while minimizing risks and costs by opting for a “managed space” rather than a traditional lease. This is analogous to renting a furnished apartment for your business, with the added bonus of covering all of your telecom needs as well. A wide array of companies across the world offer this service. The three key benefits for using managed spaces are:

- Allows for flexible growth without major capital investment
- Provides the space, furniture, Internet/calling plan for a set price
- Gives you the broadest scope of potential locations and a single point of contact to help select the best one

You can quickly move into a new space and if you’re fortunate enough to experience rapid expansion, the managed space company can simply place you into a larger unit. This saves you the need to rent big up front, allowing you to save dollars until they are justified by revenues.

Since it is possible that you may be opening a small, one-room office, having privacy for client calls can be difficult. All buildings that offer managed space also offer communal conference rooms that can be rented for a small fee. In our experience, however, the staff’s frequent need for these rooms would have created unnecessary stress—for example, there’s always the possibility the communal room won’t be available for an urgent call. To minimize this risk, when we opened The Pert Group’s London office we rented an additional two-person space, adjacent to ours, and designated it as our conference room. While it costs slightly more in monthly fees, the time and energy saved in having a space of our own more than justifies the investment.

**What staff do we need in place on both sides to ensure success?**

Regardless of how many people you are looking to hire for your new location, there are two steps that will always be required: candidate sourcing and face-to-face interviewing. Depending on the country you’ve chosen, the process of hiring abroad can take significantly longer than in the United States. Some employment contracts require 1- to 3-month notice periods. However, since this is easily the most critical step in ensuring the success of your new venture, don’t hesitate to invest the appropriate time and money to acquire the best talent.

When hiring in a foreign country, you’re obviously going to need to locate and screen the candidates. Trying to use job boards or place local newspaper ads is simply not practical, so find a recruiter you can trust. In the United States, you’d most likely work with a single agency on a contingency basis that requires you to sign an exclusivity arrangement. While they would be thrilled to have an absolute lock on your business, recruiters in other parts of the world don’t expect this exclusivity.
When staffing in one country, I worked with four recruiting firms, all of whom knew they were competing against other local agencies. This created a healthy spirit of competition while preserving The Pert Group’s negotiating leverage regarding their fees. It did make for some challenging logistics as we had to bounce all over the city to meet candidates in various offices, but in the end this approach was very successful. We met the best three or four people each agency had to offer rather than moving to second-tier candidates if the initial round was unsuccessful.

Another approach I’ve used in the past is to hire a contract recruiter. This person was paid a small monthly stipend to cover expenses and a modest flat fee for each employee produced. There was a minimum threshold required for how many weekly interviews the recruiter would hold to ensure the exclusivity arrangement didn’t soften their productivity curve. This provided some additional control over the process, and also offered significantly better visibility than would normally be possible.

Of course, you should plan to invest significant face time with prospective employees. Introducing a bad addition to your initial crew can prove disastrous. This is particularly true with your general manager candidates, as the range of characters you may encounter can be wildly varied and equally amusing. Think of the incomparably buffoonish Dwight Schrute character, played by Rainn Wilson on The Office, every time you want to simply interview a candidate over the phone. While Dwight is certainly an exaggeration of many bad habits, I have been shocked at how many seemingly qualified individuals possess many of his unfortunate behaviors.

While Dwight is certainly an exaggeration of many bad habits, I have been shocked at how many seemingly qualified individuals possess many of his unfortunate behaviors. Few things can cause more problems (both short and long term), than having a bad manager captain your new ship.

When it comes to “captains,” importing a general manager from your home office is rarely the right choice. There may be cases where this proves to be the best course of action, but in general the “import” either comes off as an interloper who lacks the cultural sensitivity to be an effective leader, or worse, a shill for the home office who can’t be trusted. To avoid this pitfall, look for a local professional with a balanced perspective on leadership: the basic rules for hiring are applicable globally.

While importing a general manager can backfire, I have found that the practice of secondment has been very effective. This term effectively means “lending a current employee to the new office for a defined period.” A secondment allows a subject matter expert to help the new staff have an umbilical connection to the company practices and culture, a connection sometimes lost on remote employees. It also provides an exciting career opportunity for the right person, without them having to carry the burden of managing an entire office.

The last employee-related item I suggest is hiring a local human resources consultant for a short-term contract (anywhere from one to three months). In some
countries, having a human resources employee on staff is a legal requirement, which can be onerous when opening a small office. A short-term contract can satisfy the legal requirement while providing a definite end date for a position that may not be required locally for years to come. Have them work on-site and play a dual role. They can help you comply with their country’s labor and human resource laws, which obviously differ greatly from customary practices in America. They can also help you create all of the documentation expected by your staff. Remember, while the venture is new for you, you’ll be hiring people who have worked for established companies with employee handbooks, retirement plans, etc. While we always stress during the interview phase that this is a start-up venture and look for people who are energized by this opportunity, it is still best to get these things done early on lest they become permanently postponed once business is in full swing.

As you enact your global growth plans, you are certain to run across additional complexities based on the nature of your business needs—along with all the other issues spelled out here. You can move forward with clarity and confidence by remembering these key suggestions:

- Establish your own footprint before you try to get a foot in the door with new clients
- Minimize risks by tapping into professionals in the U.S. and abroad and taking advantage of opportunities, such as the availability of managed space
- Budget twice the amount of time you’d expect for staffing and place key talent on the ground, but not in a leadership role.

In our own international expansion and in work with clients around the world, The Pert Group has discovered that Kofi Annan was right. Instead of arguing against the laws of gravity, or trying to change them, familiarize yourself with their basic principles and you will find many things will naturally fall into place. If you stay grounded in your goals, set reasonable targets and shape your strategy around long-term success rather than short-term objectives, you’ll find your ability to attract both clients and talent is stronger and more enduring.

About the Author

Doug Guion, President, The PERT Group

Doug joined The Pert Group in 2009 as Vice President of Operations. As President, he takes the work he began in this position to the next level, connecting the various parts of the organization and creating synergies between Client Service, the Strategic Resource Group and Operations that help the company produce the highest quality client deliverables. Doug has extensive expertise in team building, leadership development and operations management. He has achieved results in dynamic and complex international/multi-cultural environments, working with clients in Asia, Europe and North America.
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Speed (Necessarily) Doesn’t Kill: A New Way to Detect Survey Satisficing

By Philip Garland (SurveyMonkey), Kuang Chen (Captrcity), Liana Epstein (SurveyMonkey) and Annabell Suh (SurveyMonkey)

Phil presented at the 2012 CASRO Online Research Conference, March 1-2 in Las Vegas. In 2013, the Online Conference moves to San Francisco, March 7-8

Introduction

Nobody wakes up in the morning and says ‘I hope I get to take a survey today!’ We are asked to take surveys on the back of the receipt at the grocery store, on airplanes, after an online banking session–just about everywhere. With so many requests and so little satisfaction yielded by each experience, it’s likely that our motivation to give thoughtful answers is in jeopardy. Indeed, this phenomenon is called satisficing and is well-documented (see, for example: Krosnick, Narayan, Smith, 1996; Krosnick, 2000).

Today, all researches see are survey results. But underneath any mean, there are true answers and satisficed answers, which can pull means in all sorts of directions. Figure 1 below shows this process in theory, whereby the red line is the satisficing group and the blue line is the true group. The purple dotted line shows the average of the two groups. (Illustrative only, not real data.)

Survey research has been plagued by satisficing since its inception. While it is agreed that the phenomenon occurs, the ability to detect precisely when it occurs has been elusive.

Literature and Technology Review

To understand satisficing, it is helpful to first describe its opposite, desired, behavior—optimizing. When optimizing, survey respondents fully engage in four steps; 1) interpret the question, 2) search memory for relevant information, 3) integrate information into summary judgment, and 4) report judgment (Tourangeau, 1984). Anytime a person engages in steps two or three half heartedly, they are said to be weak satisficers and skipping at least one step in its entirety is a feature of strong satisficing (see, for example: Krosnick, Narayan, Smith, 1996; Krosnick, 2000).

Satisficing can manifest itself in predictable ways depending on questionnaire design and sample composition on a number of factors. These include acquiescence response bias (Schuman & Presser, 1981), and primacy (Asch, 1946) and recency (Krosnick, 1992) effects. All of these phenomena seriously undermine the reliability of measures as well as their ability to validly indicate concepts of interest.
Unfortunately, there are currently no great methods of detecting respondents who are engaging in satisficing. To date researchers have employed three main methods: speed measurement, trap questions, and the identification of “straight-lining”. Yet each of these has a major flaw. For speed, people can satisfice slowly or optimize quickly so speed requirements would lead to throwing out perfectly good data and keep bad data. Trap questions are easy to spot for regular (and professional) survey-takers and often fail to detect problem respondents. Straight-lining is problematic especially if the questions given are part of a scale, and it would be expected for the responses to be consistent.

Design
A set of algorithms and processes that comprise the method for detecting satisficing (hereafter referred to as “SatisficR”) were applied to several data sets. The dataset utilized for the purposes of this exploration were collected from major panel suppliers, but because the results reported here are in some ways unflattering, the identities will remain undisclosed.

The datasets were yielded from questionnaires owned and developed by the respective companies. Substantively, the measures focused on political attitudes, media uses and gratifications, and attitudes toward financial institutions. In one of the tests, respondents were presented with questions in one of two ways; either a grid with questions in rows and response options in columns or individual questions with paired response options. Based on the evidence form the prevailing literature, we hypothesize that the grid presentation will cause more people to satisfice.

Method
The procedure relies on the application of a well known statistical theory known as Bayesian inference. In short, Bayesian inference allows for the recalculation of probabilities upon the introduction of new evidence or facts.

Satisficing detection, then, depends on Bayesian inference with a bit of “machine learning” to examine a data file of responses in quantitative form to recognize a “normal” pattern of results. One easy way to understand this is if a person checks the ‘male’ box for gender, but the ‘yes’ box for “have you been pregnant in the past three years” then that would be an outlier. Multiple mismatches in responses across a questionnaire with, say, five questions or more would suggest (though not guarantee) satisficing. The more outlandish the combinations of answers, then the more likely the person is satisficing.

Results
Testing SatisficR on some survey data on attitudes and preferences we found that those who SatisficR pinpointed as satisficing outliers did indeed look dramatically different than those who the algorithm labeled as normal respondents. For example, in a closed-ended question (on a scale of 1 to 100) the mean score of how offensive a respondent found a sample of music lyrics fell from 43.52 (normal respondents) to 34.25 (satisficers). Open-ended questions provided even more dramatic mean differences. For example, the number of hours that respondents reported listening to their favorite music spiked from 13.51 (normal respondents) to 38.14 (satisficers).

This same finding held true on both MTurk panel data and SurveyMonkey panel data as well. MTurk data operates on a pay model where respondents earn money for each survey they take, while SurveyMonkey panel data operates on a donation model, where SurveyMonkey makes a donation to the charity of the respondent’s choice for each survey they take. We tested SatsificR with a strict threshold of 35% and a more relaxed threshold of 15%. With MTurk the mean differences between normal respondents and satisficers was again most dramatic on open-ended questions. For example, when asked for an average number of miles they drove a week, MTurk normal respondents reported approximately 65 fewer miles at the 35% threshold and
106 fewer miles at the 15% threshold. An even more dramatic drop was found with Surveymonkey data, where the mean dipped 178 miles at the 35% threshold and 356 miles at the 15% threshold.

Eye tracking data also indicates that satisficing is occurring. In panel surveys with ordered column labels for questions the average fixation length and count was lower for the bottom of the page (length: 1.43 seconds, count: 4.02 seconds) than for the top of the page (length: 4.02 seconds, count: 12.81 seconds). One might argue, on the other hand, that since the columns were ordered, one might need less time to parse the questions at the bottom of the page than at the top because one has “learned” the response option set. However, the decrease in fixation length (bottom: 2.35 seconds, top: 3.01 seconds) and count (bottom: 6.53 seconds, top: 9.63 seconds) stayed consistent when the column labels were randomized as well.

Speed, however is not enough to detect satisficing. In both Mturk and Panel data the relationship of speed to our algorithm’s outlier score for satisficing was non-significant (Mturk: p = .07, Panel: p = .33). Figure 2 to the right illustrates why there is this disconnect between outlier score and speed. Essentially, as we argued previously, there are a large portion of those who complete the survey quickly who are not satisficing and, additionally, a substantial amount of those who complete the survey slowly who are satisficing. If survey researchers rely solely on speed as an indicator of data quality they will be skewing and crippling the veracity of their results.

**Discussion**

These results suggest that limiting the observed definition of satisficing to speed can be problematic. Moreover, it gives a chance for the researcher to define what satisficing looks like on a project-by-project basis. That is, satisficing in one context may not be in another. So, it is up to the user to determine how strict or lenient he or she wants to be in defining satisficing for the machine. SatisficR is one solution to this problem, however, ensuring the quality of data should be an ongoing discussion and a top priority for all survey research companies and survey creators.

### Figure 2

*Figure 2*

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Think Quality...
Differentiating Your Firm in a Crowded Marketplace

By Steve Henke, President, Harpeth Marketing

When I was doing my ‘due diligence’ before starting Harpeth Marketing, I spoke with scores of research firms across the US to understand their perception and use of marketing and sales inside their organizations.

One of the questions I asked during that process was, “How do you differentiate your firm?”

Almost to a man (or woman), the response was something like, “We do great work… we have great people… and we really take care of our clients.”

Sound familiar?! Is that how you would respond to that question? And if everyone is saying that – then no one is really different! Which, for the most part, is the case.

Don’t believe me? Try this little exercise… take a look at the website of your top three or four direct competitors. Read through their pages titled “About Us”, “How We’re Different” or “Why Hire Us”. I’d be willing to bet that their words read an awful lot like the words on your website. Sort of depressing, isn’t it?

And if that’s the case… how can research buyers make a decision? How do you stand out? Why should they choose you over your competitors?

While there is no magic bullet, following are 13 ideas to jump-start your thinking about how you might differentiate your firm:

The Big 3:

1. Industry focus: Establish and build an expertise in certain vertical industries (e.g. automotive, healthcare, technology, etc.). Start where you already do a lot of your work.

2. Methodology focus: Become the go-to firm for certain types of work—e.g. online qualitative, ethnographies, mobile surveys, etc.

3. Application focus: Get even more targeted and specialize in certain research applications, like new product research, patient satisfaction surveys, website usability, etc.

Other ideas:

4. Technology advantage: Are you an “early adopter?” Comfortable with new technology? Position your firm as very innovative. But be careful… not all of your customers feel the same way about tech.

5. With your marketing: Flip through the pages of any research industry publication. Notice anything? Most of the ads are pretty much the same and are pretty boring. Stand out from the crowd with unique, interesting, thought-provoking and (most importantly) consistent marketing. Note: this doesn’t just apply to your advertising but also your exhibit booth, your website and blog, your social media, your presentations, etc.

6. With your content: Produce articles, white papers, eBooks, webinars and so on to position your firm as experts in your target area. Note: if you happen to decide to focus on a particular industry, methodology or application—your content becomes even more targeted and hence, even more powerful.
7. With unique operational processes: A survey is a survey... but if you can recruit to it, distribute it, process it or report on it in an interesting and unique way, you'll stand out from the thousands of other survey providers. The same applies to focus groups and other popular research services.

8. With your size & scope: Take a look at the top of the Honomichl 50. Many of these firms don’t necessarily have a ‘speciality’ or ‘focus.’ But what they do have is size and scope... they can do pretty much anything for anybody anywhere in the world. And that’s impressive.

9. By being contrarian: Want to really stand out? Swim against the tide... take the position opposite what’s popular. Be a contrarian with your blog, your articles, your presentations, etc. Note: Do this only if you really believe it. Do it as a marketing play and everyone will see right through you.

10. By your ‘first touch’: How do you respond when a new, prospective client submits an RFP? Probably like everyone else... nice email thank you, maybe a brief follow-up phone call and then a fairly standard bid package. But what if you could blow them away at this phase? What if your responsiveness, professionalism and deliverables were so different that your competitors didn’t stand a chance?

11. With speed: Of the three components of business (better, faster, cheaper), which is most important in our industry? Everyone I’ve spoken with over the years immediately points to speed. Can you re-engineer your processes to be the “fast” research firm—in all aspects of client engagement. Those that don’t or can’t change their processes will not be able to compete with you.

12. Who you target: Everybody wants to work with P&G, Coca-Cola, Nike and the like. Not only are you competing with hundreds of other firms who want that business, it’s incredibly price competitive and the nod usually goes to one of the “big boys.” But who’s calling on the mid-tier buyers, not the Fortune 50, but the Fortune 5000. It’s not nearly as competitive and much easier to build ‘relationships.’

13. With your products: Have you developed a new research process? A new piece of technology? Or are you reselling something brand new to the marketplace? Great—leverage the heck out of it. But be careful, as soon as someone comes along with “a better mousetrap” your product becomes obsolete.

I hope this list triggers some ideas in your mind. Not a single one is easy... which is why so few firms do it. And here’s the key: once you’ve decided on your point(s) of differentiation you need to live it. Build your marketing around it, adjust your operations to support it, train new employees on it, etc. Then once you do that, you’ll no longer be swimming in a crowded ocean... you’ll have a clear, blue pool all to yourself.

About the Author

Steve Henke, President, Harpeth Marketing

Harpeth Marketing works with firms in the market research industry to put in place marketing and sales systems that improve outcomes and increase revenues. You can reach Steve at (615) 415-3980 or steve@harpethmarketing.com.
Emerging Techniques of Respondent Engagement: Leveraging Gamification for Mobile Application Research

Jennie Lai and Michael Link

This year, the CASRO Technology Conference will take place in NYC, May 29-30, 2013.

Introduction
Given the growing trend of smartphone owners and app users, this opens new opportunities for survey researchers to leverage smartphone apps for data collection especially with young adults and ethnic minorities. Before initiating a research study leveraging these new technologies, it is important to first understand respondent expectations for user experience related to form/function, reciprocity, gamification and social sharing (Link, 2011). Focusing on the latter two expectations, the ultimate objective of applying game and social mechanics for engagement is to drive the desired behavior for respondents to participate and comply with the survey task (without biasing their response). This research paper will provide an overview of respondent engagement techniques experimented with the development of a smartphone app to collect media usage information. We will share insights and lessons learned on the benefits and potential implications of using game and social mechanics for engagement in long-term panel studies.

Background
Gamification is “the process of game thinking and game mechanics to engage users and solve problems” (Zichermann & Cunningham, 2011). The application of gamification techniques has proliferated in recent years in the marketing industry and by extension to marketing research, though their objectives are quite different. Even though both disciplines seek to promote engagement for their respective needs, marketing uses gamification to keep consumers returning to a product or service, while marketing research is exploring its use to engage respondents to respond and comply fully with a survey task (Ewing, 2011). To address the need for respondent engagement, survey researchers often look to minimize “respondent burden” through survey length, difficulty of the task, time consideration, etc. In contrast, gamification seeks to engage respondents by involving them more with the survey task through game-like processes.

The ultimate objective of applying game and social mechanics for engagement is to drive the desired behavior for respondents to participate and comply with the survey task.

2.1 Game Mechanics
Badges are virtual goods in the context of mobile applications and intended to be given for promoting the status of the users of a community. In order to maximize the value for achievement, the badges must be visible to others (thereby adding a social dimension). Points and levels are connected game mechanics to maximize sense of achievement. Like badges, points and levels drive status achievement but are better leveraged for goal setting especially for longer term activities (e.g., survey panel). Levels are used to indicate progress and advance
through achieving point thresholds. More importantly, other than a status indicator, levels should be meaningful and rewarded differently as users advance through the levels. This research study explored specific features of game mechanics that were deemed successful for engaging game players and adapted these techniques to encourage respondents to comply with the survey task of a long-term panel.

1.0 Method

A total of 250 employees were recruited through convenience sample across four major cities (Tampa, FL; New York, NY; Schaumburg, IL and San Francisco, CA) to participate in a pilot study of using an iOS application called Whatcha Watchin’? to collect media usage information on either iPhone or iPad devices. The study ran for six weeks, and each participant was offered a $50 contingent incentive for their participation.

In order to study the effectiveness of the game mechanics for respondent engagement, of the 250 participants selected for the study, 100 were randomly designated into a “Full Feature App” condition, which enabled all the app features for the duration of the 6-week data collection period and the remaining 150 participants were in the “Incremental Feature App” which upgraded with app features incrementally every two weeks. For the participants provided with the incremental feature app, they were not presented with any of the game and social mechanics during the initial two weeks while the participants in the other condition were presented with the full features for the duration of the six-week study period.

Results

It is important to note at the outset that because the pilot used a non-probability sample, the results are not projectable to the broader population. The findings do, however, yield important insights on respondent engagement with game mechanics especially with the hard-to-reach cohorts.

Game mechanics should drive competition and promote achievement

There were five possible badges participants could earn for the duration of the study period. The badges were intended for instructional purposes to provide positive reinforcement for completion of specific high-value activities related to the survey task. For example, a virtual badge called the “Head Start” badge was awarded when the participants completed their first full TV viewing login (i.e., provided responses to all the questions related to their TV viewing). When asked about the participants’ reaction to the badges earned in the follow-up online survey, most participants were indifferent that they neither liked nor disliked the badges. In general, the younger cohort age 18-29 years loved/liked earning the badges almost twofold (54.3%) compared to the age 40 years or older cohort (27.6%). Likewise, Asian and Black participants (73.3% and 83.3% respectively) loved/liked receiving the badges far more than the White participants (39.4%) though the sample size is significantly smaller for both Asian and Black participants.

In assessment of participants’ engagement with the badges earned, most participants were also indifferent that the badges neither encouraged nor discouraged their participation. They felt the badges should be more meaningful, i.e., rewarding badges based on specific programs/genres watched or highlighting the significance of their TV viewing entry such as being the first viewer of the show within the app community. Also, there were only five badges to earn for the duration of the data collection period (up to six weeks) and most participants earned most of these badges in the first couple of weeks once they became available, so it needs to be more evenly distributed throughout the data collection period for engagement. Some participants also desired to compete with others in earning these badges (especially with friends they can invite to participate) so they can share their status or achievement.
Game mechanics are most engaging for participants age 18-29 and ethnic minorities (i.e., Asian, Black and Hispanic)

The participants also were rewarded with points based on the high-value activities of the survey task such as accessing the app on a regular basis (but not based on volume of TV viewing entries to not influence their TV viewing behavior), responding to the push notifications, earning badges, advancing to a higher level and completing trigger surveys (a short custom survey up to five questions triggered by a specific activity such as watching a specific TV program or measuring engagement upon earning a badge). There was also a great deal of consideration when designing the point system to minimize potential influence to participants’ TV viewing behavior or falsely reporting their TV viewing information to earn more points.

The results were consistent with the results observed from the badges which showed the younger cohort age 18-29 years and the ethnic participants loved/liked the points & levels the most and encouraged their participation. The game mechanics for points and levels were noticeably less effective with respondent engagement compared to the badges. Similar to the input about the badges, most participants wanted to learn more about how to earn points and advance to higher levels. Moreover, they wanted the points and levels to be presented on a leader board so they could see how they perform in comparison with other participants. A few participants also preferred to receive notification when they advance up a level rather than having to check their status on their own. It is clear the rules of the game must be clear to the participants in order to engage them as well as offering them a different experience once they advance to a higher level.

Conclusion

Given the considerable cost, time and effort spent on app design and development, these game mechanics should be considered for long-term panel research rather than point-in-time or one-off surveys. Furthermore, when considering leveraging these gamification techniques for respondent engagement, survey researchers should examine how these techniques may potentially influence or change behaviors, attitudes or opinions being measured. The viability of mobile app research will undoubtedly depend on the continued effort in exploring these emerging techniques to engage with the hard-to-reach respondents for survey research.
References


About the Authors

Jennie Lai, Global Director, The Nielsen Company

Since she joined Nielsen in 2001, Jennie has led the research effort on recruitment and data collection methodologies for media research (both television and radio audience measurement) and consumer research in the emerging markets. Her most recent research focuses on leveraging mobile technology as a data collection tool and exploring emerging techniques for respondent engagement in mobile research. Jennie has authored/co-authored over 20 research presentations for American Association of Public Opinion Research and has published in Public Opinion Quarterly and Survey Practice. She can be reached at: Jennie.Lai@Nielsen.com.

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Michael has a broad base of experience in survey research, having worked in academia (University of South Carolina, 1989-1999), not-for-profit research (RTI International, 1999-2004), government (Centers for Disease Control and Prevention, 2004-2007), and the private sector (Nielsen, 2007-present). He received his Ph.D. in Political Science from the University of South Carolina. Michael’s research centers around developing methodologies for confronting some of the most pressing issues facing survey research. In 2011 he, along with several research colleagues, received AAPOR’s Warren J. Mitofsky Innovators Award for their work on address based sampling designs.
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What We Can Learn from Unintentional Mobile Respondents

By Gregg Peterson, Senior Vice President, Research Operations, Market Strategies International


Judging by conference agendas this year, mobile research has a significant share of attention. However, share of wallet tells a different story. For all its marketing oomph and promise to revolutionize how we collect data, mobile research represents a fraction of the total spend in marketing research today.

Nevertheless, we are already doing a lot of mobile research without trying. “Survey takers” are increasingly doing “traditional” web surveys on smartphones without “permission.” This should not be surprising. In much of the world, cell phones are the first, the easiest, and the cheapest way to read email, browse the web, and interact with the world via social media.

According to recent Pew findings, the number of US adults using cell phones to go online nearly doubled in the last three years, from 31% to 55%, and these numbers are significantly higher among black and Latino cell phone owners as well as urban-dwelling, higher-income, more-educated cell phone owners. Most significantly, 17% of adults use cell phones for the majority of their online activity. [Pew Internet report, June, 2012].

Mobile use varies greatly by respondent source and topic

How do these trends translate into survey taking on smartphones? We reviewed 17 web studies Market Strategies conducted from December 2011 to April 2012, representing multiple industry segments, survey topics and respondent types. All were HTML surveys designed for PCs but sized automatically to fit smaller devices, and invitations didn’t mention mobile as an option for completing the surveys. We categorized both “survey starters” as well as those who completed surveys as either “mobile” or “non-mobile” based on “user agent strings” sent when respondents clicked on links to survey invitations. We excluded iPads and other tablets from the “mobile” category. Therefore, “mobile” refers to smartphone in our analysis.

Mobile survey starts varied greatly, but a few patterns emerged. Responders (most especially telecom customers) from client-supplied samples were far more likely than third-party panelists to be mobile survey starters, which might simply reflect panelists’ experience with past surveys and their expectation that most survey instruments are not suited to smaller screens.
Mobile survey takers represent distinct segments, and display unique survey-taking behavior and experience

Younger respondents, women, blacks and Latinos disproportionately favored the mobile method. Even certain medical specialties were more likely than average to be mobile survey takers.

The survey experience and behavior among mobile survey takers were also unique. Mobile survey takers spent 25%–50% more time completing surveys, and the variation in survey length among mobile responders was also a bit higher (a 33% higher standard deviation compared with non-mobile responders). Cellular networks versus issues related to ease of completing surveys seemed to drive the longer survey lengths.

Mobile survey takers, especially those from customer lists, were twice as likely to break off of a started survey. But, if young people, blacks and Latinos are more likely to be mobile survey starters, high break-off rates suggest we are also losing the respondents we are often most challenged to collect data from. In other words, the rise of mobile as a viable option for completing surveys offers hope that we have a means to include the most difficult-to-reach respondents, but it means we must address the drop-off issue.

We hypothesized that mobile survey takers would break off more often on certain types of complex questions compared with non-mobile respondents, but that’s not what we found. Mobile and non-mobile survey takers broke off in nearly identical proportions on the same questions and in the same rank order. Therefore, we believe that longer survey lengths and high drop-offs were more a function of network speed than overall instrument complexity, and also reflected mobile users’ expectations—that content should be simple, easy to read and quick to complete.

Mobile survey taking offers the possibility of gathering feedback closer to the “event” being measured. Comparing the elapsed time between survey invitations being sent and when a survey was started, we found that in every client-supplied-sample study we reviewed, mobile users responded more quickly to invitations than those responding from non-mobile devices. This makes sense: Smartphones are carried constantly and checked frequently.

Mobile survey takers were just as likely to respond to optional open-ends but typed 20% fewer characters on average.

Survey response quality on mobile devices is similar

We looked at three dimensions of survey response quality: satisficing on multi-mention questions, open-ended response quality, and response distributions on key ratings questions.

• First, we found no signs of satisficing on multi-mention questions. Reviewing results from questions with lists ranging from 7 to 23 items, mobile and non-mobile were statistically identical in the median numbers of items chosen.

• Second, mobile survey takers were just as likely to respond to optional open-ends but typed 20% fewer characters on average.

• Third, we found only small differences in the number of concepts identified or the number of “sentiment topics” mentioned in open-ends. In other words, differences in response length were far greater than differences in content. More work is needed, but we imagine that content length differences are more about response styles in a mobile environment than they are about satisficing.

Perhaps the biggest question: Do mobile responders answer key ratings questions differently? If no, then perhaps none of the other differences matter. We compared top-box and top 2-box proportions across a
variety of questions, and found significant differences between mobile and non-mobile respondents in one-third of the cases, and in most of these cases, mobile respondents provided more positive ratings. It’s difficult to know if these differences were mode effects or simply differences based on the type of respondents inclined toward mobile. We tried controlling for age in a few cases, but were unable to make the differences go away. In other words, we can’t reject the possibility of mode effects. Market Strategies is conducting controlled experiments to study this phenomenon more closely.

Mild suggestions do not steer mobile respondents to PCs

From our non-experimental data analysis, we learned that mobile respondents:

- Added positively to the diversity of the respondent mix—we disproportionally attracted respondents we are often challenged to collect data from.
- Experienced much longer survey lengths and broke off at unacceptable rates, which might be driven as much by network speeds as usability, but were also likely a function of mobile users’ differing expectations.
- Responded more quickly to survey invitations, which holds promise for “in the moment” feedback.
- Didn’t satisfice more than non-mobile responders. However, without formal experimentation, we don’t know if the small differences in the amount of open-ended text provided and in some ratings measures resulted from the mode of data collection.

In 2010, Google researcher Mario Callegario suggested three ways of handling mobile responders:

- Make surveys “work” on all devices to some minimum extent.
- Turn away mobile respondents and only allow non-mobile responders.
- Create completely different mobile and non-mobile versions of surveys.

Another option might be to simply encourage PC survey taking while not completely disallowing mobile. We conducted a recent experiment involving a short, client-branded customer satisfaction study with over 7,100 respondents. In one experimental cell, we recommended using PCs in the email invitation. In a second experimental cell, we recommended using PCs after detecting mobile responders. In our control cell, we made no changes.

We found little impact: Respondents ignored our recommendations, and mobile survey starts between our control and experimental groups were similar. Overall, there is no evidence we can meaningfully change device usage with mild suggestions.

Recommendations and next steps

There should be little doubt that the world will continue to become increasingly “mobile”. Therefore, our approach to collecting data must evolve to harness the power of mobile while also accommodating mobile when it is simply the easiest, most convenient way for respondents to participate.

In this article we’ve focused primarily on the latter; however, there are many interesting uses of intentional, mobile-only research. We should recommend mobile as a primary methodology when it makes sense; that is, when the goal of the research demands that we take advantage of features only available when using a mobile methodology:

- Capturing data in the moment or when a respondent is on the go
- Using mobile tools to capture images, audio or video
- Triggering surveys or questions based on geography

Mobile may also be fit for purpose when the goal is to capture feedback from respondents who rarely or never sit at a computer or work from a larger screen. This may include a majority of respondents in some developing parts of the world as well as a growing segment of mostly younger respondents in the developed world.
Some of what continues to be important to our clients may never be well suited to mobile. We should actively disallow mobile responders when a survey is necessarily long or complex or when it includes highly detailed images or choice tests. For some companies, this might include the majority of the work they commission. But, this begs a question: When is a survey necessarily long or complex, and when is it long and complex out of tradition, habit or even laziness? Some of our instruments include introductions which require three screens of scrolling on an average-sized smartphone. Almost all of our surveys use large grids which trigger drop offs by respondents regardless of their device. And, despite years of hand wringing and haranguing by some segments of our industry, our surveys are still too long.

**Our study of unintentional mobile respondents teaches us an important lesson:** We must evolve the way we ask questions and execute all of our surveys in an increasingly mobile world. Mobile ecommerce and news sites offer up a model and a warning. The Amazon mobile optimized site looks nothing like the one you see from your desktop—there are fewer words, images and choices. This is what the mobile interface requires, and this is what mobile users expect. This is easy enough to accommodate for our mobile-only research, but raises several questions: What do we do when mobile is just a respondent choice? Does the device or question presentation change the data, independent of the people who choose to use mobile? Can we meaningfully combine data from multiple device optimized survey instruments, or must we create “mobile friendly” survey designs that work well regardless of device?

For now, we are betting that “mobile friendly” survey instruments are the way to go. These are instruments that avoid Flash, have bigger buttons and fewer words and use question presentations that work well on small and large devices. And, of course, we must all continue to experiment, learn and change our practices as the world becomes more mobile.

**About the Author**

Gregg Peterson, Senior Vice President, Research Operations, Market Strategies International

Gregg leads research operations at Market Strategies including survey programming, primary data collection, data processing, coding, global sourcing and publishing. He also provides thought leadership on survey methods for internal stakeholders, and is an occasional speaker at industry conferences. Previously, Gregg was an executive vice president at Ugam Solutions, a leading provider of outsourced operations and analytics services to the marketing research industry based in India, where he focused his time on strategy, international expansion, and new business development. Prior to joining Ugam, Gregg spent six years as the executive vice president for North American operations at marketing research agency Millward Brown.
Lack of trust and frustration was our beginning. Jim Medick, a marketing and research consultant to gaming, entertainment and government agencies was increasingly dis-enchantment with field services and their inability to conform to requirements. Rather than dealing with unmanageable outsourcing, Medick set about to expand his consulting firm to one of the largest field service firms in the United States. Jim even instituted a government compliance division with GSA certification. Nineteen years later, Precision Opinion works for the largest social science research firms in the world, political organizations and candidates, Washington associations, media, the entertainment and gaming industry as well as domestic and international Fortune 500 companies.

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Benefits of Modular Design for Mobile and Online Surveys

Surprising results include high respondent engagement, low dropout rate on mobile survey

By Frank Kelly, Lightspeed Research, Alex Johnson, Kantar Operations and Sherri Stevens, Millward Brown

Based on research presented at the 2012 CASRO Online Research Conference, March 1-2 in Las Vegas.

The ubiquity of the mobile device for communication and computing has produced profound changes in marketing research, and in online surveys in particular. Researchers today are struggling with the challenge to deliver surveys via the respondent’s device of choice, while also maintaining a consistent research environment that produces quality data and insights. This article investigates one way to address that challenge: breaking surveys into pieces to create shorter respondent experiences while still garnering the same level of insights for clients.

This survey modularization can be accomplished in two ways: a “within-respondent” approach (the same respondent takes pieces of a survey at different times) and an “across-respondent” approach (distributes modules of the questionnaire among different respondents using a multiple of the normal sample size). We believe the within-respondent approach could be the low-hanging fruit of survey modularization, simply allowing respondents to return to a survey they have partially completed. The pause points would be formalized to allow the research design to group questions for which sequential responding is needed and perhaps with self-contained insights.

The greater challenge—and the correspondingly greater prize—is in the across-respondent approach. The question is whether fusion and weighting techniques can be used successfully to create equivalent datasets and derive the same insights as though each respondent had taken all the modules. In all likelihood, neither modularization within nor across respondents will work for all studies, but we expect that one or the other will work for some studies—and that it will serve as a major step toward improved respondent attention.

Based upon Lightspeed Research’s experience, more than 15 percent of surveys are not completed, and upwards of 10 million partial interviews are considered useless and discarded in the US each year. Designing surveys in a modular way would allow data such as this to be used to effectively answer business questions. In the case of mobile, with sample expected to be more expensive for the foreseeable future, there is sufficient impetus to make use of this resource. By randomizing the order of the modules, respondent fatigue, which is commonly observed at the end of a long survey, is minimized.

Our pilot looked at the two techniques discussed above primarily in a mobile context. Working with Kantar’s mobile development partner, Lumi, we developed an application that delivered a survey in either a single sitting, or as discrete modules. In addition, there was a web-based equivalent of the survey taken by respondents in the normal online context—i.e., on a PC, laptop or whichever online device they chose to use.

Our results indicated that we should not assume higher dropout rates on mobile.
Results

How many modules will a respondent take?

Surprisingly, all 185 mobile respondents continued to the end of the survey, despite being given an opportunity to save and return at the end of each of four modules. By comparison, we observed a 6% dropout or non-completion rate on the web survey.

Will respondents take multiple cells at one time or start and stop?

Fewer than 10% of the respondents that completed the full survey paused during completion. Most of them paused only for a short while and completed the whole survey in less than 30 minutes. Just a handful took longer, and 22 hours was the longest completion time observed. This indicates that people are willing to complete the survey all the way through on a mobile phone, perhaps because they have had their expectations set by their previous online panel experience. Although we expected surveys would be completed in modules during several short downtimes across multiple locations, only three respondents changed locations during survey completion. If more than 10 minutes passed between the completions of modules, we re-asked the location question to track changes. A few respondents completed surveys in non-traditional locations, such as a bus or a train, but about 95% completed the mobile surveys either at work or home.

When designing this study we hypothesized that dropout rates would be higher on mobile devices. We assumed that people would undertake only short tasks on a small screen device, preferring a larger screen for the survey experience. To our surprise, the completion rates were excellent among those willing to install the application. Our results indicated that we should not assume higher dropout rates on mobile. This concurs with a study recently published in ESOMAR’s RW Connect by Gina Pingitore and Dan Seldin, which found that mobile dropout rates were similar for mobile web and online.

Web and Mobile Deliver Similar Data, Some Demographics Differ

Even though the full mobile and the web survey were the same, mobile respondents perceived the survey as shorter than expected. The median completion time for the full mobile cell at 9 minutes was 2 minutes faster than the web cell.

Despite the large number of qualified web respondents unwilling to take the survey on the mobile phone, we found the results to be similar. Only a few of the 40+ questions yielded statistically significant differences. When the web cell was further split into those willing or able to do so, we started to see more significant differences in the data for those not willing to or able to complete on mobile versus those that did. Other studies, such as the one by Pingitore and Seldin, also show that these two modes delivered comparable data.

Benefits of modular survey design can be significant when applied to long web surveys, including: mitigating respondent fatigue, reducing the perception of survey length and effectively using sample from partial completes.
Designing a web survey in a modular way does not add substantively to the cost, and therefore is worth serious consideration.

However, there are demographic differences in the ownership of smart phones. A January 2012 Nielsenwire post stated: “While overall smartphone penetration stood at 48 percent in January, those in the 25-34 age group showed the greatest proportion of smartphone ownership, with 66 percent saying they had a smartphone.”

So, while we may be able to get comparable results between smart phones and web, we should expect demographic differences in the audiences. In this instance, panel membership and the survey topic may have contributed to minimizing demographic differences. For example, smart phone owners were much more likely to have rented a car. The biggest differences we observed among the cells were not with client survey questions, but rather our survey satisfaction questions.

Conclusion

Mobile survey respondents will complete at least four modules (in this case the entire 9-minute survey) when offered an increased incentive. And they are likely to take the survey in a fixed location such as home or office, rather than during short downtimes throughout their day. Also, they do not drop out at a higher rate than web survey respondents. Therefore, modular survey design has limited advantages for short surveys taken on mobile.

Nevertheless, the benefits of modular survey design can be significant when applied to long web surveys. Benefits include mitigating respondent fatigue, reducing the perception of survey length and effectively using sample from partial completes. Designing a web survey in a modular way does not add substantively to the cost, and therefore is worth serious consideration.

Future Research

Future research (planned for Q4 2012) will build on these findings. First, we believe that modular survey design could enhance data quality on all surveys longer than 30 minutes by eliminating fatigue effects and by increasing the available sample size for each module without increasing the overall number of full completes. Also, we would like to learn more about the respondent’s willingness to take surveys in modules. Two factors may have influenced the apparent preference for single-sitting completion: the shortness of the survey and modules, and respondent conditioning. Could there be a link between the number of previous survey engagements and a willingness to dip in and out of surveys? Do modules need to be longer to align better with the way respondents ‘time slice’ their lives?

In addition, in a dynamic technical and behavioral environment, continual appraisal of the trade-offs between mobile-web- and mobile-app-delivered surveys is important. While the app approach engenders quicker transitions between questions and the ability to complete questions without a connection, it requires more up-front effort in the download process, and for some would-be respondents, possible concerns about privacy or security. On the other hand, for mobile web there may be fewer such concerns, but arguably the diminished up-front effort is distributed across each question transition, which will be subject to the request-response delays of web traffic.
About the Authors

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Alex has worked in technology since the mid-90s and in market research since 2000, mostly with Kantar. He first worked for Millward Brown as a web technology specialist, having spent a number of years in the internet industry, later joining Kantar’s shared services division, Kantar Operations, to focus on the development of software to support data collection.

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Sherri is the Millward Brown Global Innovation Director based in North America. With both an industry and academic background, Sherri is actively involved in conceptualizing and developing new research solutions that address the changing needs of clients and keeping the core research solutions fresh. She has an active role within Millward Brown’s Thought Leadership group.

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The Letterman Question

By Mark Earls

Mark presented at the 37th CASRO Annual Conference, October 8-11, 2012 in Scottsdale

The 2013 CASRO Annual Conference takes place at the Four Seasons Westlake Village (Los Angeles) October 7-10.

TV talk show host David Letterman used to play a game with his audience as he sifted the day’s ephemera, asking this simple question of the things he (and his researchers) found to point and laugh at: *is this anything? Or, is it nothing?* In other words, is the object, behavior or utterance significant and suggestive of an important trend? Or, is it merely junk? Should we be paying attention to it or should we smile and nod at contemporary culture’s richness as it sweeps past our noses?

I think market researchers need to start asking themselves some similar simple questions before they start doing what they do so well: *what kind of thing* is the phenomenon we are studying and seeking to explain? Is it something shaped by the agency of individuals acting independently of their peers or is it something that’s shaped primarily by social means—by the influence of others other than the individual?

It’s hard to disagree that we are living through a golden era for the scientific understanding of human behavior: in the last decade or so, science’s account of how our minds work to shape behavior and how this is enabled neurologically has grown exponentially. On the one hand, science has shown that thinking is much less important than we imagine it is (to paraphrase Daniel Kahneman, humans are to thinking as cats are to swimming—we can do it if we really have to), that our minds are lazy and prone to error in the very simplest of intellectual tasks (thanks to our use of shorthands or “heuristics”) and that our memories are at best poor guides to any observable reality. On the other hand, the wonderful complexity of human neurology continues to unfold—though perhaps contrary to the claims of the more enthusiastic vendors we remain (in the words of the leading British neuroscientist, Dame Susan Greenfield) merely “at the end of the beginning” of mapping the precise neurological basis of human behavior.

While these new insights provide tremendous opportunities for market researchers looking to describe, measure and possibly predict the behavior of individuals better than was previously the case, they remain insights about individuals—about the minds and brains of individual agents acting independently and in isolation from their peers.

All kinds of human behavior—the names we give our children, the clothes we wear, the music we listen to, our notions of fairness and attractiveness as well as a host of consumer markets—all these are shaped fundamentally by social rather than individual choices.
All too human, all too social

If there’s one thing watching Letterman has taught us in the last decade it is that the social side of human behavior is rather more important than we’d hitherto imagined. Think back a decade—a handful of ardent internet advocates aside—most of us had no experience of the connective technology that has made the likes of Mark Zuckerberg so wealthy (to be precise, Mr. Z would have still been in High School and FB not even a twinkle in whosoever’s eye it first...twinkled). Social media and the explosion of the internet in our daily lives merely serves to show how important this social side is to individual human behavior and to the spread of phenomena of all sorts, including those that Letterman and his researchers point to.

But the importance of social influence in shaping human behavior is no Johnny-come-lately, no mere product of our adoption of social media: we are a fundamentally social species whose lives are spent in the company of and—to a great extent—in the shadow of our peers. Part of our species’ incredible success can be explained by our amazing ability to outsource the cognitive load to each other; to use the brains of those around us to do our thinking, remembering and choosing. “Social Learning” or the “I’ll Have What She’s Having” effect as we call it after the deli scene in the 1989 Rob Reiner movie, “When Harry Met Sally”.

All kinds of human behavior—the names we give our children, the clothes we wear, the music we listen to, our notions of fairness and attractiveness as well as a host of consumer markets—all these are shaped fundamentally by social rather than individual choices, by I’ll Have What She’s Having. The patterns are clear in the data that record these phenomena (from the classic adoption curves of individual products we learned in Marketing 101 to the long-tail popularity distributions seen at a market level and described in our book).

Why ask?

So why is it important to know what kind of thing you’re studying—and whether it is an independently- or socially-shaped behavior—before you start designing market research?

The simplest reason is that different kinds of behavior need different kinds of research approaches.

Our existing tools were developed for a world in which the default assumption is that human behavior is primarily shaped by independent individuals—rational or otherwise—making choices and decisions independently of their peers and the social context. Accordingly, we ask individuals largely about themselves and their own perceptions, thoughts and feelings; about their past and

While we can safely aggregate the responses of a sample of individuals to represent the opinions and other responses of larger populations, doing the same thing for socially-shaped behaviors misses the point—the action is between the individuals.
future behavior and about all of this relative to the things in front of them, as if these individuals really are where the crux of decisions, choice and behavior is to be found.

Knowing that we’re dealing with a different kind of thing flags strongly the need to choose our tools more carefully—to ask more about the “who” and the “how” (“who” is the source of social influence and “how” is the population connected to each other) than about the “what” (the product and the individual’s perceptions feelings, etc).

Second, it’s important to know what kind of thing we’re studying in order to interpret the data we collect from surveys. For example, while we can safely aggregate the responses of a sample of individuals to represent the opinions and other responses of larger populations, doing the same thing for socially-shaped behaviors misses the point—the action is between the individuals.

Third, it’s important to know because social is a wide open space for innovation: it’s not that our existing tools are now totally blown, more that we have the opportunity to add to them to describe behavior that differs in important ways from our default assumptions.

So, next time you’re faced with designing a study or pondering the results of a survey, ask yourself this: what kind of thing is it that you’re studying here: Is it rooted in independent choice? Or, is it—like so much else in human life—socially-shaped?

About the Author

Mark Earls, Independent Consultant and Co-author

Mark is a recovering account planner, an independent consultant and co-author of “I’ll Have What She’s Having—Mapping Social Behavior” with Professors Alex Bentley and Mike O’Brien (MIT Press). His previous books include the influential “HERD—how to change mass behaviour by harnessing our true nature” (Wiley).
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Thinking Differently About How to Select Respondents for Surveys

By George Terhanian, President, North America & Group Chief Strategy Officer, Toluna and John Bremer, Chief Research Officer, Toluna

Introduction

Online research has experienced remarkable growth over the past fifteen years. To keep up with demand, some companies have become quite creative. Rather than continuing to rely exclusively on opt-in panelists, for example, they’ve developed new methods to include non-panelists within online surveys. They’ve also figured out how to direct or route respondents who do not qualify for one survey to another for which they might.

Despite these important advances, the available supply of respondents to which any supplier might have access is insufficient at times for certain kinds of studies, such as a tracking survey of a rare population. To meet the requirements of such studies, researchers now depend heavily on multiple samples sources (e.g., Panel A, B; River 1). Some evidence suggests, however, that the decision can have unintended consequences. In research carried out in 2008 evaluating seventeen different opt-in panels, for instance, the Advertising Research Foundation found “wide variance, particularly on attitudinal and/or opinion questions (purchase intent, concept reaction, and the like),” even after holding constant socio-demographic and other factors (Walker et al., 2009).

Since that time, some researchers have mounted new research to understand how to select multiple sample sources for the same survey without increasing bias. Proponents of these approaches cite at least three benefits: (a) consistency (or interchangeability) of new respondent sources with existing ones relative to an external standard, and (c) enhanced representativeness relative to the US general population through calibration with non-online data sources.

Although these approaches have taken a step in the right direction, we believe they have not gone far enough for three main reasons: (a) they restrict the pool of potential respondents to those from sample sources vetted previously, thereby limiting supply, (b) they seem to assume that the vetted sample sources do not change over time, and (c) they rely on benchmark data sets that have either limited shelf lives or uncertain external validity.

We therefore suspect that they may not produce the same levels of sample representativeness and response accuracy as a new methodology, which we refer to as SmartSelect, that selects potential survey respondents in real-time from either a single sample source or multiple sources based on how well their characteristics match an appropriate, evolving standard with demonstrated evidence of external validity.

How SmartSelect Works

The basis for the aforementioned match is the SmartSelect score, defined here and elsewhere as a single, summary measure representing the probability (computed through logistic regression) that an individual belongs to one group (e.g., the general population) rather than another (e.g., the Toluna panel), given his or her characteristics. Individuals with the same

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1A variation of this paper titled “A Smarter Way to Select Respondents for Surveys?” (Terhanian & Bremer, 2012) appeared in the November 2012 edition of the International Journal of Market Research. It is available upon request from the authors or directly through the International Journal of Market Research.

2The SmartSelect score is referred to as the propensity score by academic researchers.
score would in turn possess identical, or nearly identical, characteristics.

The methodology’s potential benefits are myriad and difficult to overstate. To summarize briefly, it enables researchers to:

• Select respondents from virtually any source, not only previously vetted ones.
• Identify an individual (or group) who possesses identical, or nearly identical, characteristics (e.g., age*gender*race* income*education level*various attitudes and opinions) to those of another individual (or group).
• Identify sample sources (e.g., Panel A, B; River 1, 2) that are interchangeable.
• Identify sample sources (e.g., Panel C, River 3) that are complementary. For instance, Panel C may include men only, while River 3 may include women only. SmartSelect could be used to assess whether the two, together, represent the target population accurately not only on gender but other factors too.
• Ensure that the characteristics of individuals that are interviewed in a new wave of a tracking study match those of previous waves.
• Migrate a tracking study from one sample source (or set of sources or mode) or supplier to another sample source (or set of sources or mode) or supplier.

A Methodology to Evaluate the Effectiveness of SmartSelect

To evaluate the effectiveness of SmartSelect, we depended on data from a fifteen-minute survey of US adults. The survey’s twenty-three questions explored various topics, including general issues, attitudes towards privacy, technology ownership, and online behaviors.

The questionnaire was administered in late February and early March 2011 via two modes (telephone and online) to four samples (one telephone, three online) of approximately one thousand individuals per sample.

For the telephone sample, quotas were established for region and gender. For the online samples, we set quotas not only for region and gender but also for age, race-ethnicity, and education level.

The online samples consisted of (a) Toluna opt-in panelists invited directly to the survey via email, (b) non-members of Toluna’s online opt-in panel who were directed to the survey after clicking through an advertisement or link on the Internet, and (c) members and non-members of Toluna’s online opt-in panel who were routed to the survey, typically after not having qualified for one or more other surveys. Hereafter we refer to the three as the “direct invitation,” “river,” and “router” samples, respectively. The data from the online samples were not weighted.

To estimate each respondent’s SmartSelect score, we regarded the data collection mode—online or telephone—as the dependent variable in the logistic regression model. As independent variables, we used questions representing region, gender, age, race-ethnicity, level of education, household income as well as the following three measures: (a) willingness to pay higher prices to protect the environment, (b) preference for tailored, personalized communications from companies that are marketing to them, and (c) preference for “trying new things” as soon as they become available. An additional output of this exercise is a statistical model, which we can use in the future to select respondents in real-time from multiple sources for new surveys of the same population based on how well their SmartSelect scores match those of the telephone respondents.

To simulate the effects of the SmartSelect methodology, a precursor to estimating its accuracy, we selected from the combined pool of online respondents a stratified random sample of 1000 distributed equally across a lone stratum; namely, the distribution of telephone respondents’ SmartSelect scores, which we first sorted into quintiles. The SmartSelect sample, therefore, is a sub-sample of respondents who are also represented in the direct invitation, river, and router samples.
To assess accuracy, we follow recent precedent (e.g., see Yeager et al., 2011) and consider the modal response of each question as the one of interest. For each source, we then calculated the (absolute) difference between each question’s modal response and the benchmark. We refer to the overall average of those differences as the “mean absolute deviation.”

The second, more important measure of accuracy is the Mean Squared Error (MSE), which is excellent for comparing two or more sets of estimates because it takes into account the mean absolute deviation of the estimates (i.e., the first measure) as well as the variability of those estimates. There is longstanding precedent for using the MSE for this purpose, dating back (to our knowledge) to the evaluation of the US pre-election polls of 1948 (Mosteller et al., 1949).

For the demographic and household questions, information from the 2010 US Census, the Current Population Survey, or other government-funded surveys will serve as the benchmarks. For all but one content question, we have chosen to regard the responses from the telephone survey as the benchmarks. We recognize that any of these measures could be biased for various reasons.

Evidence of Effectiveness

Does SmartSelect work? It looks that way. Table 1 shows that responses from individuals selected through the SmartSelect methodology differed by 3.4 percentage points, on average, from the benchmark. The table indicates, as well, that the SmartSelect MSE was 103 percent lower than the Router MSE, its closest competitor. Put differently, the evidence suggests that the Smart Select methodology is superior to standard quota sampling and may therefore enhance sample representativeness and increase response accuracy, among other possible benefits.

Concluding Thoughts

Given the evidence presented here, we believe the SmartSelect methodology merits more attention, study, and scrutiny. We are therefore in the process of conducting new research to evaluate the performance of a live execution of SmartSelect rather than this simulation. As part of the research, we will also investigate how different weighting procedures and decisions, in conjunction with SmartSelect, affect sample representativeness and response accuracy, among other measures such as cost and time required to field surveys.

If the SmartSelect methodology can deliver on the promise it demonstrated here, then there may be broader implications. By increasing sample representativeness and response accuracy, for instance, it may reduce further the perceived risks associated with conducting research with non-probability samples. And by opening the door safely to just about any potential respondent irrespective of his or her originating source, it may accelerate the growth pace of online research.

Table 1. Accuracy of the Responses to All “Content” Questions

<table>
<thead>
<tr>
<th>All Content Questions</th>
<th>Telephone/Benchmark</th>
<th>Direct Invitation</th>
<th>River</th>
<th>Router</th>
<th>SmartSelect</th>
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</thead>
<tbody>
<tr>
<td><strong>Key Measures</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base</td>
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<td>1100</td>
<td>1100</td>
<td>1098</td>
<td>1000</td>
</tr>
<tr>
<td>Mean Absolute Deviation</td>
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<td>5</td>
<td>4.9</td>
<td>3.4</td>
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<tr>
<td>Variance</td>
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<td>17.2</td>
<td>18.1</td>
<td>16.9</td>
<td>8.8</td>
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<tr>
<td>MSE</td>
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<td>43.7</td>
<td>42.9</td>
<td>40.9</td>
<td>20.2</td>
</tr>
<tr>
<td>MSE vs. SmartSelect</td>
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<td>-116%</td>
<td>-112%</td>
<td>-103%</td>
<td></td>
</tr>
</tbody>
</table>
References


About the Authors

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George is Toluna’s North American President and Group Chief Strategy Officer. He is a member of the board of directors of the Advertising Research Foundation as well. Through the years, he has also served on committees or advisory groups for organizations such as the European Society for Opinion and Marketing Research, the US Department of Education (USDE), the British Polling Council, CASRO, and the American Social Health Association. Prior to joining Toluna in 2011, George served in a variety of roles for nearly fourteen years at Harris Interactive, including President, Global Solutions; President, Harris Interactive Europe; and President, Global Internet Research.

John Bremer, Chief Research Officer, Toluna

John joined Toluna as Chief Research Officer in April 2011. Before joining Toluna, he served as Chief Research Officer at Compete, Inc., a Kantar Media company. Prior to working at Compete, John worked for Harris Interactive. His work has consisted of research into all areas of representativeness. He has specialized, however, in areas of non-probability sampling, rare populations, selection bias and online survey research. He is most well known for having developed the proprietary propensity score weighting technique utilized by Harris, as well as producing successful election forecasts in the US in 2000-2008 and in the UK in 2005-2010. In addition, he co-directed the Harris Center for Innovation. Previously, John was a senior research assistant to Dr. James Heckman, specializing in selection bias issues.
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Are You Delusional?

By Simon Chadwick, Managing Partner, Cambiar

You are the CEO of a market research company. From where you sit, things are going pretty well. The business is growing (perhaps not as fast as you would like it to but, hey, these are difficult times economically speaking). From your corner office, the staff seem pretty happy. Yeah, there are a few that gripe and moan, but that’s par for the course, right? The important thing is, they get what you are trying to do and they support you in doing it. You treat them well—they have all the benefits that you can afford and you recently introduced Pizza Fridays, which seems to have gone down well.

So, all is well with the world. Or is it? Could it be that you are just delusional? That the world you see is the world you want to see?

Evidence from the Cambiar National Employer Brand Study suggests that, yes, you are delusional. Unless you are one of those CEOs that truly is an inspired leader and is leading a company of people that really, really advocate for you. But the truth is that, for the majority of research companies, this is just not the case.

Let’s back up for a moment. What is “Employer Brand” and why did Cambiar study it?

“Employer Brand” is the concept that every company has an internal brand as well as an external one. You have an image that you extend to the outside world, but internally there often is another truth where employees have a perception of the company that is at odds with that external messaging. Consider, for example, a company that says it can do x, y and z but really only does x. The employees know this and management usually knows this, but often the CEO does not recognize this. The Employer Brand is at odds with the market brand.

Why is Employer Brand important? After all, you don’t see it on the balance sheet. It’s important for a number of reasons:

• Your Employer Brand is what determines whether your employees give 80%, 100% or 120%.
• It also determines whether your employees are true advocates for your company—or whether, God forbid, they are actively undermining you.
• Employer Brand governs your employee attrition (or “turnover”) rate—if you are having to replace employees on a regular basis because they leave, that’s a real cost to you not only in recruitment fees but also in terms of your ability to grow and be profitable.

A research company with a great Employer Brand is one that has inspired leadership coupled with a compelling strategy that is clearly and frequently communicated.
Your Employer Brand also has an external impact—if it is really high, people will be lining up at your door to join you. Conversely, if it is really low, they will do anything to avoid working for you.

This concept is well known and understood throughout industry and, indeed, there are a number of generic studies (such as Best Place to Work awards) that try to measure this. But, to date, there has been no study of Employer Brand as it applies specifically to the Market Research Industry. It was for this reason that Cambiar fielded a study earlier in 2012 on the phenomenon.

So what did we find out?

First, the good news: 46% of our respondents—who were researchers at all levels employed by market research companies employing 10 people or more—rated their companies as excellent or outstanding. That’s quite an achievement! Half our workforce are really happy with the place in which they work. Now the bad news: a third of our respondents rated their companies so low that we wondered how these companies could continue in business. Overall, Research America Inc. achieved a rating that we called “Good, but could do a lot better”.

This raised the question: What makes for a really great research company in which to work? And, conversely, what makes for a lousy research company? The answer is both intuitive and surprisingly simple. A research company with a great Employer Brand is one that has inspired leadership coupled with a compelling strategy that is clearly and frequently communicated. While things like compensation and benefits are important (especially in larger companies), nothing can substitute for these three interlinked attributes. A lousy company, on the other hand, will be missing on at least one (and usually more) of these attributes. People want to know that they are coming to work for a reason - a cause that they share, a goal, an idea that really motivates them. They want to see this embodied in their leaders and they want their leaders to lay out exactly where it is that they are going, what the journey will be like and what their role is in getting to the destination. They want this communicated to them in an inspirational and yet practical way that involves the minimum of BS.

In many research companies, this actually happens. But in many more it does not. And here is where the delusion sets in. CEOs in our study were far more optimistic about their Employer Brand than were their employees and, interestingly, their managers. CEOs were much more likely to see their companies through rose-colored glasses at the same time as their employees were telling us that things were not rosy at all.

I don’t know about you, but I loathe and abominate the phrase “our employees are our biggest asset”. It’s a cliché, a bromide that many managers use to make themselves feel better about the fact that they do not treat their employees as their biggest asset. Employees are not “assets”. They are human beings that need to feel that what they are doing is important, that want to feel joy in building something worthwhile and that want to feel that the enterprise to which they devote most of their waking life is worthy of their endeavors. Absent that, they become journeymen or, worse, saboteurs. It is our job as leaders to ensure that we unlock that motivation, that joy and that feeling of worth to the benefit of not only ourselves and our businesses but also our people. Many CEOs in our business are failing in this endeavor, not because they are bad people but because they lack the empathy to understand how their employees really feel. They are divorced from the reality of their employees’ daily lives. They fail to understand that they
need to lead (in all senses of the word) their employees on a journey that all of them understand and buy into.

The first step towards bridging this gap is to understand (truly and without prejudice) where your Employer Brand stands. This is not the same as doing an Employee Satisfaction Survey (most employees discount these off the bat in terms of anything materially changing). It is about understanding what the real key drivers of advocacy are in your firm and then working diligently to put those drivers to work. Do this and your chances of commercial success are multiplied many times over.

Time to throw away those rose-colored glasses!

Simon Chadwick, Managing Partner, Cambiar L.L.C.

In his career in the market research industry, Simon has started a number of successful companies and restructured a number of challenged companies. Before forming Cambiar, Simon was Global CEO of NOP World, a $400 million market research and consulting concern. In this role, he was responsible for creating a cohesive global group out of nine highly distinctive research companies in the UK, U.S., Europe and Asia. Italia. Simon is a leader in 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.

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Eye on Legislation & Regulation:
Data Collectors Must Note Recent Decisions on Web Tracking
The Year Ahead: Updated Regs on Children’s Online Protection, Auto Dialers

To date, 2012 has proved to be remarkably quiet from a legislative perspective as election season politics served as the primary focus in statehouses nationwide. However, several regulatory actions and lawsuits occurred this year that should be noted by CASRO members. We anticipate that with the election behind us, 2013 should prove to be more active. This article recaps the past year and looks at anticipated developments for next year.

Prepared by Russell Anderson and Duane Berlin of Lev & Berlin P.C., CASRO General Counsel

NOTE: Member companies may contact CASRO for additional details and specific guidance.

Compete

This October, the FTC settled its unfair trade practice complaint against Compete, Inc., a subsidiary of Kantar that performs web analytics-based research, by entering into a Consent Order with Compete.

Specifically, the FTC’s complaint alleged that:

• Compete’s software, which was installed on the computers of more than 4 million consumers, collected much more information than was disclosed in Compete’s privacy notices, including some information users communicated on secure web pages, such as credit card numbers, financial account numbers, usernames, and passwords, and Social Security numbers.

• Compete failed to adequately filter personal information as it promised in its privacy notices.

• Compete failed to take reasonable security measures to protect the data it collected, such as by sending sensitive information from secure web pages.

The Consent Order between the FTC and Compete places a number of burdens on Compete’s ability to continue to use tracking technology moving forward. Chief among the requirements was that Compete must provide a separate and prominent disclosure before installation of any tracking agent that specifies all information that will be collected and how that information is to be used and shared. The consumer would then be required to expressly consent to the collection, use and sharing of that information. The FTC further required that Compete provide these disclosures (and receive affirmative consent) from existing users before it could continue to collect any further data from such users.

The obligations under the order were to stay in place for a period of 20 years. While the requirements that the FTC placed on Compete are generally not materially “new,” for example, the disclosures are roughly the same as those required in the FTC’s Consent Order with Sears and the CISP and audit requirements mirror those found in Google’s Consent Order, this is the first time in our knowledge that a market research company and CASRO member has been directly targeted by the FTC for privacy-related unfair trade practice violations.

The requirements saddled on Compete constitute not only a public embarrassment for Compete, but also a burden on resources for 20 years. In addition, any breach of the Consent Order may lead to fines by the FTC. For example, Google recently was fined $22.5 million for breaching its own 2011 Consent Order with the FTC.

If you are conducting tracking-based research, it is imperative that you regularly review your privacy disclosures and ensure that they are consistent with your actual data collection practices.
KISSmetrics Lawsuits

Class action lawsuits were filed this year against KISSmetrics, a web analytics company, and over 20 of its customers (including Hulu) over claims that the way that the company’s tracking software operated constituted an invasion of privacy. Specifically, the lawsuits alleged that by using ETag technology, which allows for tracking independently of HTTP cookies, KISSmetrics was able to track users even after they deleted their cookies, thus making tracking more resilient to users’ efforts to protect their online privacy. KISSmetrics settled the direct lawsuit against it in November 2012 for roughly $500,000. The lawsuits against the customers, including Hulu, to our knowledge remain active.

These types of suits are not new—similar lawsuits were previously filed against QuantCast and Clearspring in 2010. While the ultimate success of these lawsuits remains questionable given the lack of demonstrable actual damages, these lawsuits can be very problematic. In our experience, customers regularly require indemnification for these types of claims. As such, KISSmetrics will likely be forced to expend large sums defending many of these claims on its customers’ behalf. In addition, KISSmetrics will be forced to explain to its customers why they are being sued. We strongly recommend never using technology which “re-spawns” cookies after they have been deleted by the user.

2013 Forecast

• Federal Legislation

Currently, there are at least 10 different proposals in Congress to provide increased protection of individual privacy. None of these bills has made any notable progress during the current Congress and it is unclear if they will gain traction in the new Congress given the continuing split of control between the House and Senate. We believe that the industry could work with any of these proposals, although some may be more preferable.

• Physician Payments Reporting

We also continue to wait on the Centers for Medicaid and Medicare’s (“CMS”) final regulations implementing the transparency provisions of the Affordable Care Act. CMS in its earlier proposed regulations muddied the applicability of the research industry’s exemption—specifically, that the statute does not require disclosure of payments to physicians for participation in market research 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 the identity of the respondents. Unfortunately, the regulations that CMS proposed late in 2011, stated: “[W]e propose that awareness of the identity of the covered recipient by an agent of the applicable manufacturer will be attributed to the applicable manufacturer.” While market research organizations are not “agents” of manufacturers, we believe that risk-averse compliance departments within some pharmaceutical manufacturers may require reporting out of an abundance of caution. CASRO submitted comments to CMS in an attempt to have the final regulations comport with our original understanding of the statutory exclusion.

• Expansion of TCPA Liability by the FCC

The Federal Communications Commission (FCC) is expected to issue a ruling in the next several months, which could greatly expand liability under the Telephone Consumer Protection Act (TCPA), to include companies that employ call centers that make calls prohibited under the TCPA.

Calls for market research are largely exempt under the TCPA, because they are considered to be non-commercial. However, the use of “automated telephone dialing systems” to any telephone number assigned to a cell phone or any similar service for which the called party is charged for the call is prohibited for all purposes (including survey research) unless prior consent is obtained. The term “automatic telephone dialing
“system” is defined in the TCPA as “equipment which has the capacity—(A) to store or produce telephone numbers to be called, using a random or sequential number generator; and (B) to dial such numbers.” The penalties under the TCPA can be extreme—up to $1,500 per phone call.

To date, the FCC has issued conflicting statements regarding whether liability under the TCPA extends only to the call center actually making the prohibited calls or additionally to the call center’s client on whose behalf the calls or other contacts were made. Several petitioners to the FCC requested clarification regarding this point and, in turn, the FCC requested comments. The FCC is due to issue its ruling at any time. While several commentators believe that the contemplated expansion of liability is inconsistent with the TCPA and may be successfully challenged in court, the inclusion of “on behalf” liability nevertheless represents a concern for the market research industry.

Research firms that employ call centers may now be exposed to direct liability for violations of the TCPA by their call centers. Given the FCC’s revised position, members of the very aggressive TCPA plaintiffs’ bar may also be emboldened to include clients of call centers as defendants in their class action lawsuits. As a result, the importance of obtaining indemnification for claims relating to violations of law from call center vendors (backed by the vendor’s insurance) will be more important than ever. In addition, research firms that operate call centers should be especially careful with respect to calling cell phones and may find their own clients asking for indemnification in the event such prohibited calls are made.

**FTC “Nutrition Labels”**

The FTC revealed at a recent conference that it is developing a “nutrition label”-styled template that will permit companies to disclose their privacy practices to consumers in a concise and standardized way. These “labels” would be based on examples from the food and beverage industry as well as the model privacy form used by financial institutions under the Gramm-Leach-Bliley Act. Jon Leibowitz, the FTC’s Chairman, stated at the conference that the agency is attempting to identify the “five essential terms” that should be incorporated into these “labels.”

The proposal raises several questions. Will the notice form apply across all modes of data collection or is the “label” form only intended for areas such as mobile applications where brevity is required? In addition, it is unclear whether the “label” form would be intended to supersede or solely to complement existing privacy policies. For example, would the label be required on the home page for a website?

Based on the FTC’s past statements in its Privacy Reports, we believe it is most likely that the FTC intends for the “label” to largely replace the current privacy policy concept, especially for mobile applications and other instances where space is limited. This effort by the FTC could be very helpful for the research industry, because at the very least the FTC’s expectations for the contents of privacy policies will presumably be better defined.

**COPPA Revisions**

Lastly, the FTC will likely finalize a substantial revision to its Children’s Online Privacy Protection Rule in 2013. The Rule promulgated by the FTC under the Children’s Online Privacy Protection Act (COPPA) has not been substantially revised since COPPA first became effective in 2000. In late 2011, the FTC first introduced proposed amendments and this summer the FTC requested further comments regarding additional proposed revisions. While the revisions are not yet final, we believe that research companies should start preparing for numerous changes in how they collect and use the personal information of children.

We continue to believe that research companies will be able to comply with most of these revisions with only
minor tinkering to their notices and procedures, the removal of the “email plus” parental consent mechanism may necessitate broader changes. “Email plus” allows a company to request consent from a parent in an email message, and then to follow-up to confirm that it was, in fact, the parent who provided consent. That follow-up can occur through either requesting in the initial email that the parent provide a phone or fax number so that the company can use one of those mechanisms to confirm consent or after allowing a reasonable time delay sending a second e-mail to the parent to confirm consent. The FTC wants to phase out this “email plus” mechanism, because it is extremely easy for a child to defeat. For example, the child could just give their own e-mail address. While we understand that other research trade groups may have taken an aggressive stand against the FTC’s elimination of the “email plus” mechanism, we disagree. There are other, more reliable, affordable means of obtaining parental consent available on the market and “email plus” has indeed acted as a deterrent to companies using those better methods.

Russell Anderson, Attorney, Lev & Berlin, P.C.

Russ is an attorney with the firm of Lev & Berlin, P.C., and together with General Counsel Duane 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. He is a graduate of the College of William and Mary Law School and Wesleyan University.

Duane Berlin, Principal, Lev & Berlin, P.C.

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 12 years. In his work for CASRO he has submitted two legal briefs to the U.S. Supreme Court and has represented the industry and the association on many legal challenges relating principally to respondent confidentiality. Duane is a member of the International Association of Privacy Professionals and a member of the Board of Directors of The Roper Center for Public Opinion Research at the University of Connecticut.

About the Authors
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The Measurement of Consistency in Online Research

Steve Gittelman, Ph.D., Chief Science Officer, Sample Solutions
Elaine Trimarchi, Executive Vice President, Sample Solutions

It wasn’t too long ago that we relied on probabilistic models for collecting our data. Telephone facilities were quite adept at the pursuit of respondents. Studies with 70 percent recovery rates from duly harassed respondents were accomplished with considerable effort. Recovery rate itself was an important metric in evaluating the utility of research data. Those days are gone.

Telephone has lost its luster, but this is becoming an old story now. Most practitioners only remotely recall those halcyon days when accurately representing a population through appropriate data collection methods was our calling.

As online research gained traction we held on to the high bar that a representative sample frame implied. Our claim to a representative sample frame became our weak point. Academics assailed us mercilessly that our samples were not properly grounded in theory to achieve anything that might be representative. As we recoiled off the ropes some of us called for a retreat from claims that were indefensible. Instead, we advocated that the industry pursue consistency in its research. A consistent sample has now become the substitute for a representative one. Well, not really. That dirty little “r” word continues to haunt us.

Consistency would seem easy to measure. If your data remains constant then you are consistent. But what if the world is changing? Should our data remain constant? Clients need to know if the change that they see in data is real or the artifact of changes in the sample frame. If the sample frame changes without warning, then there can be little assurance that the shifts we see are real.

To confound things, there has been a considerable amount of data that has demonstrated differences between panel sources. There is much for us to fear as panels change their sourcing, merge with one another, change incenting models and go from high to low usage periods. With all these drivers of variability, why should we expect online panels to be capable of consistency in the data that they collect? In fact, convenience sampling is a prescription for instability, a warning that things might change. The maintenance of a stable sample frame requires effort. We ask ourselves, are online panels capable of sustaining consistency? After all, they seem to be standing on shifting sands.

Clients need to know if the change that they see in data is real or the artifact of changes in the sample frame. If the sample frame changes without warning, then there can be little assurance that the shifts we see are real.

As part of the Grand Mean Project, we have been privileged to a close look at over 300 online panels in 35 countries. All the panels provided us with 500 or more demographically balanced respondents who completed an 18-minute interview created as a standard measurement device. Some panels agreed to complete three or more waves of data collection separated three or more months apart. Essentially this was the equivalent of a tracking study created to diagnose change in the sample frame. Like any other tracking study, we collected data of interest. Here we had a battery of ten segmentations covering purchasing behavior, sociographics, and media plus seven others that covered various verticals. Our 105-question instrument drilled into self reported panel participation and monitored the
Consistency appears achievable in those markets where online panels are well established. We theorize that in markets where the online panel community is relatively new to the completion of surveys there may be more who are poorly engaged.

Survey-taking behavior of respondents within the questionnaire itself. For example, there were two grids, one with 18 questions and a second with 13 questions. The use of such grids is still common, but they have the tendency to elicit non-discrimination of responses (straight-lining). Allowing such behavior was actually to our benefit in distinguishing between sample sources. We created a fingerprint of the respondent through their answers as well as their reported and actual behavior. That same fingerprint provided us with a means of characterizing the online sources themselves.

At the time of our presentation at CASRO, only a dozen panels in six countries had completed the prescribed three waves. By tracking their quality metrics, as well as the data that they generated, we could assess their stability. The news is relatively good. Those who agreed to complete the task were generally consistent, although a few others, whose data was not included, dropped out at the second wave. What intrigued us the most is that all participants completing the task allowed us to report the data, albeit anonymously.

Consistency appears achievable in those markets where online panels are well established. We theorize that in markets where the online panel community is relatively new to the completion of surveys there may be more who are poorly engaged. Sadly, in these countries we found high percentages of those who demonstrated top two bar failure of our engagement tests. Poorly engaged respondents tend to provide less consideration to their answers; they straight-line more and provide inconsistent responses to logically identical questions. Clearly, the tendency of such respondents to satisfice makes them unreliable sources of information. The larger and the more variable these respondents are the more likely they are to be a disturbing influence.

The manner in which poorly engaged respondents provide answers is critical to their impact. If they provide random responses, their data will waffle around the median. If they provide directional responses they will tend to provide a more dramatic data shift. In these data, the poorly engaged provide directional, positive responses creating a bias sufficient to move them from one purchasing segment to another. As example we compare two online samples from BRIC countries, one in Russia and a second in China.

OMI Research (Online Market Intelligence) in Russia has been a stalwart adherent to the transparency that comes with being tested for consistency. They have subjected themselves to seven waves of consistency analysis. Their respondents appear to be highly engaged with the percentage of those who demonstrate top two bar failure of our engagement model never exceeding ten percent (Figure 1.). This result is in parallel with the best panels that we have examined in the world. In comparison, we provide the data from a panel in China (Figure 2.) where top two bar failure has been variable and ranged between 29 and 35%.

**Figure 1.** Respondent engagement for OMI Research in Russia over a two-year span. Notice that the top two bars representing 2 and 3 or more faults on a five-fault scale never exceed 10%.
Figure 2. Chinese panel. Notice that top two bar failure ranges from 29 to 35%.

These panels appear representative of others within their host countries. We compare them to demonstrate the impact that different levels of engagement have on the data we collect.

In figure 3 we provide six waves of Russian purchasing segments collected from OMI over the two years we have examined them. In figure 4 we provide three waves of Chinese data collected over fourteen months.

Figure 3. Russian buying behavior segments.

Figure 4. Chinese buying behavior segments.

While not perfect, the data we collected over the years from OMI Research has been reasonably stable and seemingly logical. In contrast the data we collected in China appeared incredibly stable, but highly illogical. Almost every measure we tracked in China was consistent. On the other hand, one of our findings was that no one in China was price sensitive, a rather unlikely result if taken at face value. Chinese respondents appear to be satisficing, they are reading the instructions and answering all grids in the positive. This moves them from the price sensitive segment to the purchasing segment dramatically biasing the results we report.

We can only conclude that consistency isn’t everything; a dose of accuracy appears to be in order.

About the Authors

Steve Gittelman and Elaine Trimarchi have championed the need for standardized metrics for online research. Their company Sample Solutions (Mktg, Inc.) has developed a new division called, Sample Source Auditors, best known for its continuous tracking study, The Grand Mean Project and Consistent Track. Both Steve and Elaine have thirty years of data collection experience and have made the pursuit of quality online data collection their mission. They have rigorously analyzed over 200 global sample sources in 35 countries and in their view; we should be able to identify real shifts in data from variation in the sample frame.