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Data Quality

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Makeover!

You may notice *Alert!* Magazine looks a little different. Well, after four years we felt she needed a few Botox treatments and a little lift here and there. So here she is, with a few less wrinkles and a new attitude – just in time for summer!

Along with the new *Alert!*, I would also like to introduce the new *Alert!* Editorial Advisory Board. These members of the profession will take part in the content development and overall improvement of *Alert!*.

We will be adding a few new “advice” columns in which readers can write in and ask our experts. Be sure to check out Dr. Pete’s column and the BSW’s expert question. Member profiles and company profiles will help you get to know your colleagues. This month be sure to read about Steve Lavine and his company of PRCs. Don’t forget to tear-out the August To-Do List and tack it on your bulletin board for better planning.

With the addition of so many new features, the pages of *Alert!* are jammed-packed. Many of these articles have been placed on our Web site for you to check-out. 

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“There’s nothing wrong with change, if it’s in the right direction.”

-Winston Churchill



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By Michael Lieberman, Multivariate Solutions

[Editors Note: To view the figures discussed in this article, please visit www.mra-net.org/publications/brands.cfm]

Do loyalty programs work? This question is as murky as, say, what is the meaning of life. Some work. Some don't. Still, nearly 75% of shoppers in the U.S. now belong to at least one loyalty program.

Common knowledge in business circles state that loyalty programs are useful, sometimes *very* useful.

A strong marketing program for business loyalty has three known goals:

- 1.) to acquire new customers;
- 2.) to keep existing customers; and
- 3.) to grow these customers into larger and more lucrative customer categories.

Loyalty programs are as broad as they are diverse. There are plastic cards, smart cards, thermal cards and magnetic strips. There are frequent-buyer programs, frequent-flier programs, frequent-

player cards and frequent-dining coupons. There are points-at-the-pump schemes, turkey giveaways at Christmas (along with \$100 copper roasters in which to cook them) and, as of March 2008, Starbucks Corp. said it is rolling out a customer loyalty program that gives customers free coffee refills as well as free add-ons such as soy milk or flavored syrups.

Sony BMG Music Entertainment and Starwood Hotels & Resorts Worldwide, Inc. announced that they are working together to develop a loyalty partnership that will build "unique guest experiences through an array of branded music and entertainment programming, special products and exclusive guest opportunities across the Starwood Hotel portfolio." Buy your favorite novel on Amazon and you can get points to read that book as you fly across the country on American Airlines.

As loyalty programs and their related tactics have matured,

increased attention has been placed on maximizing the bang for the buck. Industry knowledge, guesswork or instinct are

Earn Points Toward Your Next Purchase!

no longer suitable substitutes for strategic risk analysis. Marketers today are under increasing pressure from their bosses to show a greater return on investment (ROI). When marketing managers are asked how they are optimizing their budgets, specific promotions are often questioned. What gets measured gets done, as the saying goes. Budgets are limited, so, how does the manager know he is doing his best?

The answer is optimization. Simulating a loyalty promotion, restricting the budget and searching for the peak.

This article is an abbreviated rundown of how a segmentation/ROI study functions. First, there is the market research/data mining component of segmentation, followed by uses of Monte Carlo forecasting and optimization of a company's promotion.

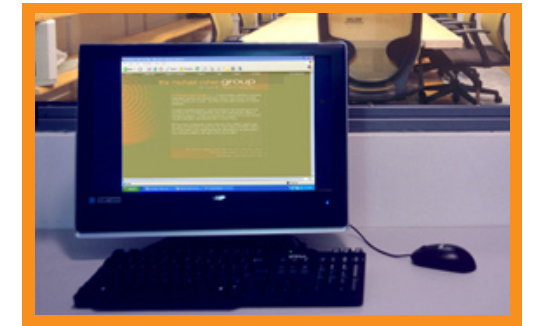
To do this we will use a fiction example – let's call it Colossal Supermarkets and its flagship store, Food City – as an example of how to design a specific promotion and to maximize its return within the company's promotional budget.

Food City's Program

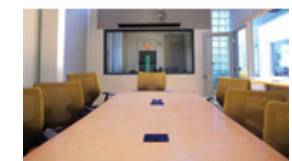
The Colossal sales manager has a loyalty program that he wants to deploy for the U.S. holiday season. Food City is a regional chain, with stores concentrated in the Pacific Northwest. They want a bigger slice of the turkey and pie the locals rush to supermarkets to fill up on. So Colossal Supermarkets initiated a program in which all

(Continued on page 12)

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President's Perspective



“Aspirin,” “Kerosene,” “Data Quality”: Are These All Generics?

There are certain brand names that over time have been used so prolifically that they have lost their individuality and become generic words. Aspirin and kerosene are two examples. Xerox and Kleenex are two others that have fought long and hard to remain brands. I fear that for marketing research professionals, we may be approaching a similar fate for “data quality.” The term has become so debated and ubiquitous that it may be losing its meaning.

Back in the day, some of my business school friends used to joke about playing a game called Buzzword Bingo: Every time a professor used a term that had become so hackneyed as to lose its meaning, like “shareholder value” or “core competencies,” they marked a card until someone got “Bingo.” Is the term “data quality” becoming just another blank on your “Buzzword Bingo” card?

Look at the agenda of any recent MR conference, or the pages of our trade publications, and data quality is clearly getting a lot of attention and conversation. Unfortunately, it seems there isn’t a lot of consensus on what data quality means or what it stands for. Some in our profession have questioned the magnitude of the issue. Most, I would venture, have divergent opinions on its true definition. Others debate which elements of the marketing research value chain (another buzzword) should harness the responsibility to maintain data quality.

Your association and allied organizations are all working both collectively and independently to frame the issue and to search for solutions. It’s a necessary battle, and MRA will continue to take a lead role in waging it. I can, however, wonder aloud, whether this battle is ultimately winnable.

Like everyone, I have opinions, and fortunately I have a venue in which to express them publicly. I firmly believe that data quality in marketing research has become a concern. No, I don’t believe that the world is crashing down, nor would I maintain that the majority of research being performed has major data quality problems. But I do see some serious scuffs in the armor.

At the risk of rehashing some of the most prevalent accusations of data quality breaches, my staff and I are constantly on the look-out for straight-lining in online surveys, satisficing, professional respondents, lack of survey validation, leading and poor survey design and poor sampling practices. I recognize that many less-than-qualified entrants have emerged on the landscape and that they’re creating pseudo research


that clients accept – often because it is cheap or because they don’t know better and/or because it conveniently creates that proverbial lamp post upon which a drunk can lean upon for support rather than illumination.


To that end, I take serious issue with some of the newer attempts to measure advertising effectiveness. These often begin by asking highly compensated online panelists to claim that they saw a specific ad in a specific issue of a magazine, and then suggest that these same respondents can rationally discern that the same single ad in a single issue of a magazine actually compelled them to take a specific action on a product. Much as we wish they could, consumers simply can’t directly link behavior to stimuli in that way.

But let’s return to my earlier point that there is little consensus on what actually constitutes data quality. You might suggest that my biggest pet peeve, above, isn’t really a data quality issue, but rather an issue with overall project design or inappropriate use of research methodology. And therein lies the real challenge with which we must be aware when addressing such a large and difficult to grasp issue as data quality.

It is absolutely incumbent on each of us – whether we are a data collection firm, full service researcher or End User – to maintain an ethical and sound methodological approach behind every component of the research and insight derivation process.

But at the end of the day what we really need to be mindful of is not the process as much as its outcomes. To paraphrase an old favorite quote, the best marketing researchers understand that what matters most is taking the time to provide actionable insight and strategic direction framed by both the empirical and the intuitive and spending less time dwelling on the unachievable goal of creating a bullet proof process.

Obsess too much on the latter and we either lose the attention of those we need to guide, or worse, accomplish nothing. At the risk of filling in a blank on your Buzzword Bingo sheet, what’s most important is that our work “adds value.” 

Jon Last is the Vice President, Corporate Marketing & Research at the Golf Digest Publications. He can be reached at jon.last@golfdigest.com. 

Got a comment on what you’ve read in this President’s Perspective? Add it to MRA President Jon Last’s blog, “Last... But Not Least” at www.mra-net.org/lastbutnotleast.



No Summer Lull For The Marketing Research Profession

It is very ironic that this issue is addressing data quality: because of the symbolism of the month of August for most readers and because of the amount of activity I have to report on.

In the Northern Hemisphere most of us think of August as a lazy lumbering time. In North America the work load often slows for family vacations. Even our governments shut down. In Europe you must work around the traditional summer leave. So during this slow lumbering period we publish an issue about a subject caused by a slow unresponsiveness of the profession. Data quality is not a new issue and much of what is coming to light could have been avoided by an industry that was more in tune with itself and its own short comings. We could have avoided much of the quality issues in on-line research by formally adopting the methodology early and by applying true metrics and performance measures.

But, let us not fool ourselves; there are as many issues of quality in other forms of research. We have ignored metrics and measures in many forms of research, with different companies calculating response rates and other key client data in various manners. As an association manager I will say that associations have to shoulder much of this blame. I have reviewed various codes and ISO standards and find them grossly wanting. All of them (including our own) to address true quality measures.

In any business segment there exist grey areas. Like most industries, these grey areas produce innovation and insight. But, they also produce poor performance. How do we allow the grey areas that produce innovation to continue and reduce the grey areas that allow for bad quality?

Three years ago, MRA took the first step to address this problem with the Professional Researcher Certification (PRC), which helps identify legitimate survey and opinion professionals, based upon experience, continuing education and ethics. On July 1st we launched Certification 2.0. This second generation of the program addresses the challenges and feedback we have received. The program is stronger and much easier for participants to navigate. To address the concerns of other associations and industry groups whose constituents were not given adequate opportunity to enroll, there is open enrollment through December 31st.

With less confusion and enhanced communications, more credible researchers, who wished to participate in the program will have an opportunity to join. After December 31st an exam will be required.


In collaboration with CMOR, we have launched the second step. Led by Patrick Glaser of CMOR, we are now performing internal reviews of research companies. Companies are granting access to their internal information and processes. All proprietary and trade secrets are secured by a confidentiality agreement, but the overall performance of the company is reviewed, evaluated and commented on. The key to credibility is transparency and this is gold standard in transparency. At this time the review process is limited to on-line research companies, to address the immediate industry concerns. All panel companies can apply for the review and the first two evaluations will be published shortly.


These evaluations are incredibly thorough and each company is given a report on their performance and any recommendations for improvement. We will address other forms of research in the future.

We are collaborating with other associations in this effort. Staff and volunteers from MRA and IMRO have been participating in ARF's efforts since inception and we are excited about the goal of obtaining metrics. We believe that when ARF completes their process, the metrics they derive will be evaluated against the internal information we have collected from the aggregate of our internal reviews.

We would not have been able to develop the review program without our IMRO leaders and CMOR's strong desire to collaborate with associations. The CMOR Respondent Cooperation efforts for the past 12 years are the basis of much of the work on quality being done today. I would like to thank Kathy Pilhuj and Patrick Glaser for their efforts on behalf of the industry.

MRA will be collaborating even closer with CMOR going forward due to their vital efforts. An example of such was the recent legislation passed in Louisiana. State elected officials were on their way to passing legislation to stop push polls (political telemarketing) and the language would have included legitimate research. Through the efforts of CMOR Government Affairs Volunteers, a key MRA member and LaToya Rembert-Lang (State Affairs Director for CMOR), the legislation was pulled and legislation that CMOR helped write was put forward to protect research in the State. The legislation still addresses the push polls, but protects legitimate research.

Quality only matters if we are allowed to perform research! MRA is uniquely qualified and able to address both sides of this equation, so that our profession survives and evolves. No summer lull here! 

To respond to this article, e-mail Lawrence Brownell at executivecolumn@mra-net.org. 

August To-Do List...

- ☐ Register For MRA's Fall Conference & RIF 2008
November 3-5th
JW Marriott Las Vegas Resort & Spa, Summerlin
Register Now! www.mra-net.org/conferences/FC_08/
- ☐ Stop by the Great Lakes Chapter Conference - 25th Anniversary
When: September 11-12, 2008
Where: Detroit, Michigan
- ☐ Register for the Web Seminar: Pharmaceutical Market Research from a Quantitative Perspective: Practicalities and Pitfalls
Presenter: Janna Walsh, Adelphi Research by Design
When: October 29, 2008
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Brand Loyalty Programs

(Continued from page 7)

Food City preferred customers were enrolled in a new and enhanced loyalty program called Food City’s Holiday Gift Bag. In all, nearly a million Food City customers were enrolled. They received color-coded cards in the mail. Each color represented the amount of money spent on a monthly basis at Food City by each customer ‘unit’ (a unit can be an individual, couple, family, household, etc.).

Food City’s Holiday Gift Bag actually operates on a per month baseline. Smaller spenders are invited to join Preferred Membership. Bigger spenders receive a Gold Gift Bag Card. There is Platinum card and then the highest, the Food City Mayor’s Club.

Each tier is tied to a level of benefits. The higher the tier, the more extras Food City dishes out. To make the program more attractive, Colossal Supermarkets tied its benefits to other loyalty programs, such as card rental discounts, frequent flier points on partner airlines, or even discounts on menswear. Basically, the more you spend, the more you get ‘free.’

The Analysis

There are two stages to the analysis. First, to determine the confines of customer segmentation. That is,

where would be the best place to draw lines among the different colors of the Gift Bag cards in order to divide up return? These customer boundaries are commonly referred to as the ‘efficient frontier.’ This stage utilizes a mixture of cluster analysis (multivariate segmentation) and Monte Carlo simulation.

Secondly, how much should each point be worth? Assuming each ‘point’ with the program had a cost (for example, if one point returned a 1% discount, the ‘cost’ of a point might be \$.01). What we were assigned to do is to set the ‘optimal’ ratio of points to spending so that the return on each point would be maximized.

Segmentation

Market segmentation is a behaviorally based, statistical approach to putting respondents into baskets. Each basket is mutually exclusive, and the final ‘basket’ is tied to the amount of money each unit spends each month at Food City. Food City has been asking customers to fill out a small, customer satisfaction card – demographics and a short section regarding their food purchase behavior – which is then tied to their customer identification number.

(Continued on page 14)

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(Continued from page 12)

This information provides valuable information about marketplace complexities facing Food City consumers.

The final groups are formed combining the results of the cluster analysis, which is tied to spending amounts. These are shown in Figure 1 on MRA's Web site (see page 6 for URL).

The Monte Carlo Process

Monte Carlo simulation is a method for iteratively evaluating a deterministic model using sets of statistical distributions as inputs. This method is often used when the model is complex or involves more than just a couple uncertain parameters. A simulation can typically involve more than 10,000 evaluations of the model.

In a Monte Carlo simulation, a model in spreadsheet format is set up and the cells whose values come from the survey results, customer databases, financial reports, etc. are identified. A distribution of possible values using the appropriate means and errors is specified for each cell. In other words, the *shape* (referred to in statistics as a distribution) of spending per month for Food City customers could be different from, say, the number of trips to Food City a given customer makes per month. Monte Carlo allows for these different distributions.

A series of trials is then generated, each one representing a possible outcome of the process. Instead of a simple spreadsheet that yields one answer, Monte Carlo allows the spreadsheet to run 10,000 times, each different parameter moving within its shape, yielding 10,000 different outcomes. When these are shown in a cumulative chart, the *chances of* a given outcome can be determined. For example, what is the chance that Food City customers will spend more than \$500 a month?

In our case, parameters of spending and input are set up using their customer satisfaction survey and customer database. To determine the output of the optimization, these spreadsheets are run, say, 10,000 times. This is called the forecast.

Optimization

The goal of any optimization is to make the input value (decision variables) that generate the output (forecast) as large – or as small – as possible. Figure 2 on MRA's Web site (see page 6 for URL) summarizes the process.

Optimization has many applications, including:

- utilization of employees for workforce planning;
- configuration of machines for production scheduling;
- location of facilities for distribution;
- tolerances in manufacturing design;
- management of portfolios; and
- calculation of optimal price/promotional points.

In our case, the Decision Variable is the value of the points that will be rewarded for each tier in the Food City program. The forecast will be the incremental increase in spending for each value of the points.

Food City's Optimization

Once all the variables are entered and the spreadsheet is complete, the final step is to let the optimization software run and run. It is common for the forecast (which runs, say, 10,000 outputs), to run 10,000 times to find the optimal level.

Here are the constraints we built into the optimization process:

- maximize ROI;
- stay within the promotional budget; and
- try to stimulate growth of all Food City shoppers.

Given the nature of customer behavior, it is natural to expect those customers in the Platinum or Mayor's Club categories to have a higher increase in spending due to the promotion. That is all well and good. However, in the market reality, the percentage of Preferred Shoppers is far greater. Food City wants them to spend more as well. In addition, it is commonly understood that not everyone will redeem every point he receives. The 'expected redemption' is another variable built into the model.

Once the optimization is run, there are two outputs that need to be analyzed. The first is called the spending 'hurdle.' That is, at what point do members move from one category to the next? These are not necessarily the same as the spending segments shown above, for the simple reason that spending is not static, but moves up and down depending on holidays, family and life events (e.g. birth of a child, moving, promotion at work).

The second output we look at is the 'value' of each point when redeemed. Remember, the name of the game is *return on investment*: if Food City gives away too much, that return drops.

After the optimization is complete, the top results are analyzed. A few scenarios are rerun to validate the results. A few things needed to be tweaked so that they made market sense. For example, if the optimization suggested that the spending hurdle was \$563.35, it makes more sense to set it as \$575. If the suggested point value was \$0.0986, it makes more marketing sense to set it at 10¢. Each of these things is tested.

Once we complete the analysis, we can make final decisions about where to set the spending hurdles and set the value of a point. Figure 3 on MRA's Web

site (see page 6 for URL) summarizes the findings of the Food City study.

Our conclusions show that the most efficient segmentation of Food City customers occurs at the monthly spending ratings. That is, as monthly spending for each customer passes another hurdle, the customer's behavior changes.

For example, if monthly spending of a given 'unit' is \$550, they are likely to be in the Platinum group (see Figure 1); perhaps a large family or a professional, two-income household. If unit spending is, say, \$850 a month, they are likely in the Food City Mayor's Club, where they are more likely to purchase premium items, have a professional mom, and perhaps send their kids to private school.

Finally, the point value of \$0.15 maximizes Food City's return on investment, keeping in mind how much more each level of spending will increase with the awards and the incremental cost of giving away 15¢ a point.

A good way to understand this figure is that

if Food City made each point worth 10¢, customer spending would not rise as much. If they made each point worth 20¢, customer spending would rise, but the cost to the company would be greater. Food City makes the most money when they price each point at 15¢.

“Remember, the name of the game is *return on investment*: if Food City gives away too much, that return drops.”

Conclusion

As computing power increases and marketers become more savvy (e.g., Amazon knows your favorites), the optimization process becomes increasingly easier to facilitate a project like Food City's. Experience has shown that implementing the new technique, and other risk analysis measures, can have a high learning curve, but ultimately yield effective, cost efficient results.

The marriage of survey research, data mining techniques, the Monte Carlo method and optimization is increasingly reducing the risks of developing these promotional programs and improving return on investment for marketing managers.

Michael Lieberman is the Founder and President of Multivariate Solutions. He can be reached at michael@mvsolution.com.

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Are You Ready For Fall Conference?

By MRA's Education Workgroup

MRA's Fall Conference - November 3-5, 2008 in Las Vegas - has been redesigned to integrate traditional lecture programs and panel discussions with new interactive workshops and round table discussions. That's right, you'll experience hands on, activity-based education sessions *and* sip cocktails with your favorite MRA friends.

The new workshops and round table discussions have been carefully designed to offer members an interactive immersion into the most important topics for today's marketing researchers. You will walk away with valuable and actionable tips and techniques to apply back at the office. Check out some of the content planned for this year's event:

Processes, Trends and Techniques in Research

This track provides practitioners and experts with a look into emerging methodologies, practices and procedures. The following is a sample of what attendees will learn:

- How to design, implement and successfully analyze multi-platform studies.
- How the hottest technique being used today is taking data from various sources and integrating it so researchers can identify trends and create actionable results.

Excellence in Research

This track is focused on best practices in the marketing research profession. The following is a sample of what attendees will learn:

- How ethnicity usage can improve the data collected, and how using key findings can assist in making more comprehensive and targeted decisions.
- How facility owners, moderators and research buyers can come together to help bridge the gap between expectations and delivery.

The Business of Research

This track provides management-level attendees with tools to build their brands and to improve their day-to day operations. The following is a sample of what attendees will learn:

- How to stand out in today's competitive market by diversifying your products and services, and obtaining the tools needed to best position your offerings in the marketplace.

Research Fundamentals

This track provides the basic skill sets for practitioners in need of training or experts in need of a refresher course in certain areas of market research. The following is a sample of what attendees will learn:

- The principles of conjoint analysis and new methodological developments and how to identify situations in which conjoint analysis is an appropriate research tool.

Also new this year, are three optional workshops that will be held prior to the official start of the conference (Monday, November 3 from 9:00-10:45 a.m.).

- Attendees will be able to pre-register for sessions that will help them learn more about:
1. Simultaneous Translation
 2. Mobile Research
 3. Writing Effective Proposals

We can't wait for you to experience everything the MRA Education Workgroup and Program Committee have planned. As always, there will be lots of networking opportunities too. Don't delay in submitting your registration and making your hotel reservation. Doing so will ensure you get the early bird registration fee and MRA hotel rate. We will see you there!

Note: If you're interested in working with MRA's Education Workgroup, please contact Marisa Pope, Workgroup Chair, at mpope@jacksonassociates.com.

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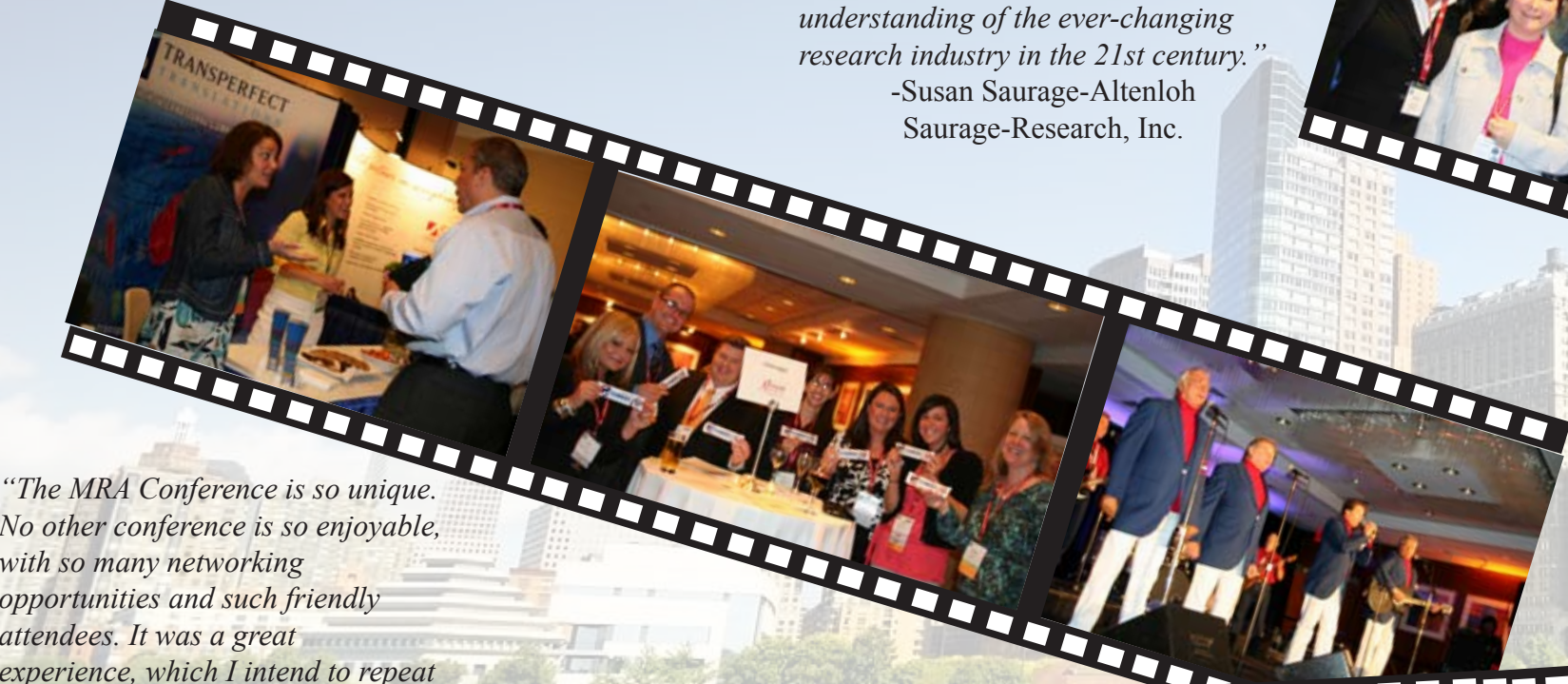
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-Susan Saurage-Altenloh
Saurage-Research, Inc.



"If you are a research professional and not involved with the MRA, you are missing out on wonderful educational and networking opportunities. The MRA is not afraid to tackle the tough topics we face every day, and the membership includes some of the nicest, high-quality people you'll ever meet."
-Dan Womack
Aflac



"The MRA Conference is so unique. No other conference is so enjoyable, with so many networking opportunities and such friendly attendees. It was a great experience, which I intend to repeat several times!"

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Cherlyn Robinson
Client Services
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MRA Seeking Nominees For Awards!

These awards will be presented during the Fall Conference and Research Industry Forum, November 3-5, 2008 in Las Vegas, NV. Nominate your fellow members for their outstanding Volunteer efforts!

Recognize Volunteers who make a difference and energetically support MRA at the National level.

Celebrated Company Award

This award recognizes a company that has provided outstanding volunteer efforts and/or has shown outstanding support at the **National level for 5 years or more.**

Considerations should be:

Number of volunteers that the company has allowed to participate for conferences, educational events, Boards, Committees and Task Forces at the National level; the support of National Conferences through attendance; significant gratis efforts on behalf of MRA; magnitude of Volunteer time on behalf of MRA.

2007 Recipient:
Schlesinger Associates, Inc.

To access the nomination form, use this link:
www.mra-net.org/pdf/company_award.doc

Rising Star Award

This award recognizes individuals who have provided outstanding volunteer efforts at the National level for **LESS than 5 years.**

2007 Rising Star Recipient:
Steve Larson

To access the nomination form, use this link:
www.mra-net.org/pdf/rising.doc

Shining Star Award

This award recognizes individuals who have provided outstanding volunteer efforts at the National level for **MORE than 5 years.**

2007 Shining Star Recipients:
Linda Brazel; Tammie Frost-Norton

To access the nomination form, use this link:
www.mra-net.org/pdf/shining.doc

Impact Award

This award recognizes a Non-Industry professional who has had a positive or meaningful impact on MRA and/or the opinion and marketing research profession.

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Alert! Book Review

Market Research Is...

By Bruce Mendelsohn

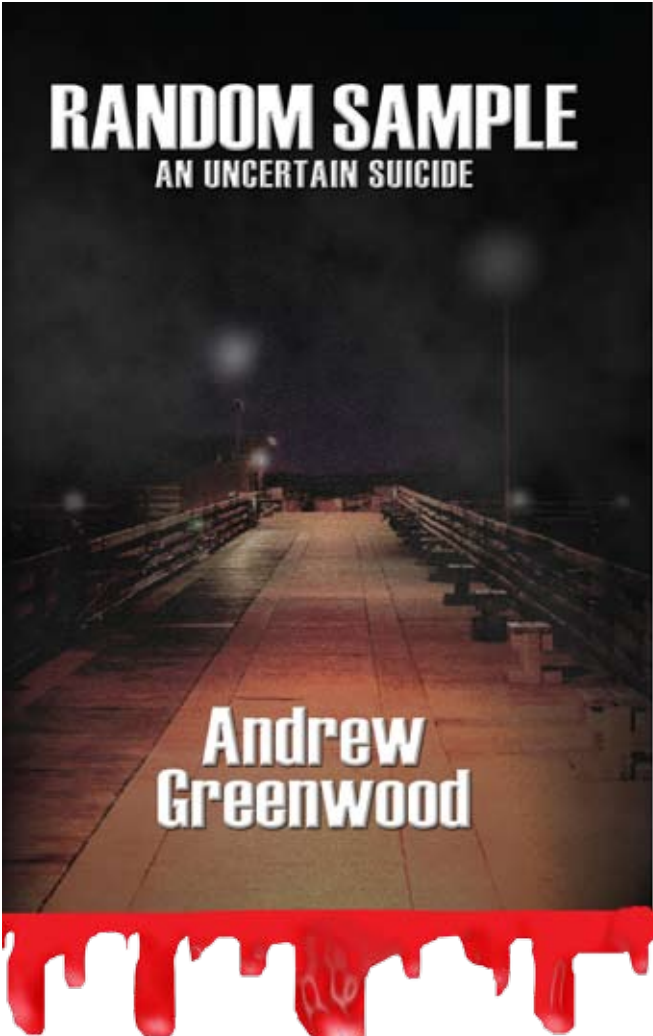
Among writers, the saying goes that you write what you know. Andrew Greenwood knows market research, he knows military training, he knows Texas topography and he knows a thing or two about how to write an engaging murder mystery. You'll find the sum of Greenwood's knowledge in *Random Sample: An Uncertain Suicide*, the second of his "Random Sample" trilogy.

The cast of characters from Greenwood's first novel, *Random Sample: The Improbable* .38, returns in this entertaining though campy and somewhat formulaic mystery. Set in Houston and the nearby Hill Country, *An Uncertain Suicide* pits mild-mannered market researcher Rhett Sanders, his sidekick Defense Attorney Chris Beck, and the lovely Toni Darnell against misnamed doctors Robert and Alex Goodwell and Jake Taylor, a highly trained killer looking for that one "big score."

While the brutal murder of one of Houston's most generous philanthropists makes front page news, a seemingly unrelated suicide is relegated to the back pages of *The Houston Chronicle*. Days later, Rhett Sanders, sole owner of AC Research, plays his usual game of seeing if any of the names match people in his company's database.

He gets a hit from one of his focus groups, and, drawing on his years of market research experience, discerns a discrepancy in the man's behavior. Even more confounding is the interaction between the man and another man from the focus group. As a market researcher, Rhett's quest for clear answers is further confused by a hefty life insurance payment and

Title: *Random Sample: An Uncertain Suicide*
Author: Andrew Greenwood
Publishing: BookSurge Publishing (February 19, 2007)
Pages: 384
Price: \$17.99



shady goings-on at a local medical clinic.


Enlisting the talents and charm, respectively, of his best friend Chris and his girlfriend Toni, Rhett drills relentlessly deeper into the mysterious connections. As he drills deeper, his team of enthusiastic amateur investigators is increasingly imperiled by antagonists who poison, kill and incinerate anyone who stands in their way of getting what they want.

Greenwood carefully shepherds the plot, injecting intriguing though stereotypical subplots of a grieving widow, a disgruntled former employee and an enthusiastic though doomed private investigator. At his best when he pegs the progress of *Random Sample* to the over-arching motives of money and revenge, Greenwood is at his worst when he tries to describe female motivation and behavior.

As you might expect in a book written by a market researcher, *Random Sample* features pithy asides in which Rhett expounds on the value of market research: "... With nearly twenty years of market research, including conducting over a hundred focus groups, Rhett considered himself proficient at reading people. He could tell by their body language, by what they said and how they said it,

which products and services they would or wouldn't buy and their reasons for their choices."

Rhett gets confused, however, when actual human behavior conflicts with the qualitative results he gets in his formal focus groups. From the epicenter of his confusion reverberates shockwaves which create sufficient momentum to propel *Random Sample* at an engaging pace. Despite a few superfluous plot diversions, Greenwood makes you want to cheer for Rhett as the plot rises to its inevitable crescendo.

While you won't confuse Greenwood with top-tier murder-mystery novelists like Nelson DeMille, Erle Stanley Gardner or Rex Stout, he nevertheless has created in *Random Sample: An Uncertain Suicide* a cast of believable characters and a plot that will – should you run out of books by the aforementioned greats – keep you intrigued and involved. 





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7 Steps to Maximize The Data Quality In Phone-Based Surveys

By Rachel Kuller, Zanthus

[Editors Note: To view the figures discussed in this article, please visit www.mra-net.org/publications/alertphonequality.cfm]

For many research companies and their clients, the cost and time efficiencies presented by Web-based survey administration make online surveys the norm today. However, there are still instances where a telephone-based survey is a must. The most prevalent of these is when a representative sample of the population is needed. Though the growing presence of cell phone-only households has threatened the ease with which phone survey results are mapped to the larger population, representation is still superior than that achieved with Web-only data collection. The 2007 Pew Internet & American Life Project

found that although 75% of all U.S. adults use the Internet, just 37% of adults aged 65 or older, 56% of non-Hispanic blacks, and 61% of households with income less than \$30,000 do so (www.pewinternet.org/trends/User_Demo_2.15.08.htm).

We will present a step-by-step guide

to ensuring your phone-based surveys provide robust, reliable data. We review seven steps from survey design to data review, providing specific guidance for each. Here, we will focus on computer-aided telephone interviewing (CATI), although many of the same principles would apply to administration using a paper-based instrument.

While we don't go into detail on selecting a vendor for CATI fielding, it is a given that selecting a quality-minded vendor is a must. We recommend you make sure your fielding vendor has checks in place to oversee interview quality, such as a validation process where a minimum of 10% to 15% of respondents are called back to confirm actual participation, and 10% to 15% of interviews are monitored.

1. Careful questionnaire design

Multiple "research on research" studies show that through its impact on data quality survey design can make or

break a study. As noted by survey methodologist Maria Sanchez, "Questionnaire choices can help or hurt the quality of data collected by interviewers...[and] inadequate questionnaire design will increase measurement error." Poorly worded questions and questionnaires that place excessive cognitive burden on the respondent are unlikely to elicit the answers we're looking for and may give us data we can't trust. In addition to the basic rules of good questionnaire design, there are CATI-specific issues to consider. The list that can be viewed on MRA's Web site is not intended to be exhaustive, but touches on some of the most common design issues.

- Provide clear interviewer instructions (e.g., which items to read vs. not read) to ensure consistency across interviews.
- Provide pronunciation guides for potentially unfamiliar terms.
- Keep wording casual and non-threatening to increase respondent comfort.
- Use a forced "yes/no" approach to multiple response questions so that the respondent doesn't have to remember and process a long list of items.
- When appropriate, put "none," "never" or "does not apply" at the top of response lists, and allow the interviewer to skip reading the remaining responses if that answer is chosen.
- With numerical items (e.g., questions asking about frequency or quantity), consider coding an open-ended response instead of reading the respondent a long list of options.
- For open-ended questions about topics like unaided product awareness, make sure code lists are exhaustive and include commonly used abbreviations and acronyms. This will eliminate the need for interviewer interpretation and judgment. Please see the MRA Web site for more detail and specific examples of how to apply these suggestions.

2. Programming and testing

With programming and testing CATI studies, the same basic tenets apply as with Web survey testing: the program should be checked for fidelity to the questionnaire instrument, and all logic instructions should be tested rigorously. You should also attempt to verify appropriate survey behavior when invalid responses are entered (e.g., entering a letter when a number is required). We additionally recommend conducting a mock interview in which one researcher administers the survey (either over the phone or in-person) to another. Mock interviews can unearth unanticipated issues with question wording or question appropriateness before the survey is sent to the field.

Using an uninvolved researcher as a respondent

(Continued on page 28)





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(Continued from page 24)

increases the chances that lingering issues will be discovered, since that individual will bring a fresh perspective. If the CATI programming is done in multiple languages, this is also a time to check that all translations were performed and entered correctly.

We also recommend, if possible, examining a mock data set entered with the finalized program. At this point, logic instructions and data mapping can be verified through examination of the data set. This will prevent the possibility of having to discard otherwise valid data because variables were captured incorrectly or respondents weren't asked the appropriate questions.

3. Briefing

Once the survey is finalized, programmed and ready to launch, it's time to brief the interviewers. In cases where an outside agency is used for fielding, this may be a two-step process:

- First, the researcher(s) should meet with the field supervisor to review the questionnaire, highlighting critical areas and providing any needed instructions. Discuss the goal of open-ended questions and review where probing is desirable. Go over pronunciation guides and make sure interviewers understand product descriptions.

- Second, the researcher(s) should listen in as the field supervisor briefs their interviewing team, providing additional color and direction as needed, and answering interviewer questions.

This is a good time to emphasize to the field supervisor and interviewers that their comments and feedback are greatly appreciated, both during the briefing itself and later, during fielding. Fielding multiple interviews with live respondents gives an interviewer unique perspective on how well a question is working.

Although it is technically not necessary to discuss the study objectives when briefing, we recommend doing so. When

interviewers grasp the purpose of the survey, they are more likely to provide important feedback and recognize when a respondent misunderstands a question.

4. Live Monitoring

Monitoring live interviewing serves two important functions. It gives the research firm a chance to identify places interviewers are introducing bias or misrepresenting a question, and to observe questions that may not work as expected. Additionally, it can provide confidence to the client and/or provide proof that a controversial question does or does not belong. We recommend that live monitoring occur at multiple points in the process. Interview quality can vary widely, so it's advisable to monitor as many different interviews as possible. Each live monitoring session should be followed with a debrief with the field supervisor.

5. Getting input from the field

The field supervisor and interview staff are an invaluable resource – use them! Keep your channels of communication open. Schedule an official meeting one to two days into fielding to get the field's feedback on how the survey is going and where problems are arising. Let them know ahead of time about any particular areas of concern. This is a great way to make sure everything is fine-tuned for a consistent and smooth data collection process during fielding and, for tracking studies, across future waves.

Continue throughout the fielding period to stay in touch with e-mail and phone calls to make sure you find out about any issues with questionnaire design or sample disposition that emerge later in fielding.

6. Soft launch data review

Ideally, fielding will be deployed in two stages, starting

with a limited "soft launch." The soft launch follows briefing, and includes data collected during the first few days of monitoring. Soft launch data evaluation provides a window into survey performance, interviewer performance, respondent quality and data collection mechanics. Be prepared to make survey changes and discard interview data from the soft launch as needed.

The research team should assess survey completion times and evaluate responses to see if they fall within expected bounds. Now is the time to delete or rephrase questions that aren't performing well or are driving the survey length past acceptable, budgeted parameters.

Examining dispositions and data frequencies by interviewer can pinpoint interviewer-specific issues. For instance, if one interview is experiencing a large proportion of drop-offs or is getting more item non-response, that interviewer may need more training. Similarly, it can be useful to give targeted feedback if any interviewer's data shows subpar open-ended response quality.

Reviewing verbatims is also a way to see if there are any responses missing from pre-coded lists, and to spot potential issues with question comprehension or inadequate screening criteria.

Checking soft launch data lets you weed out low-quality data and determine whether you need to increase the total sample size to ensure a minimum number of "good" completes. It also provides insight into whether the survey is too long or complex to hold respondent attention. Double-checking that all variables are recorded properly into the data file can save your data processing

team substantial grief and effort at the back end, and should be a routine part of your soft launch.

7. Final data file review

Dispositions and quota fulfillment should be monitored daily throughout the survey to evaluate status and make sampling adjustments as needed. Once fielding is complete, the same best practices apply to data processing as would for any study. Fraudulent or inattentive respondents should be eliminated from the data set, and outliers should be trimmed in accordance with your company's standard practices and client agreement.

Open ends need to be carefully coded, with researcher review of all code lists and at least a subset of coded responses. A post-mortem with the CATI fielding partner is also a good idea, so everyone benefits from learning what worked particularly well and what can be improved next time.

Conclusion

Maintaining high data quality during CATI administration requires some time and thought, but is achievable with every study. By following the recommendations outlined above for the seven primary phases of the study, you can feel confident that your next CATI study will produce robust, reliable data.

Rachel Kuller is a Senior Research Consultant at Zanthus. She can be reached at rkuller@zanthus.com.

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George Bernard Shaw famously declared that England and America were two countries divided by a common language. Oscar Wilde wrote in *Canterville Ghost* that the Brits “have really everything in common with America nowadays, except, of course, the language.”

Most of us are aware of some differences in spelling, vocabulary and idiomatic expressions when comparing British and American English. For example, it is common knowledge that the word *color* in America is *colour* in England, or that Americans like to *socialize* while the Brits *socialise* instead. But there are other differences between the two language variants. Take

prepositions: American athletes play *on* a team while their British colleagues play *in* a team. Or how about words that mean different things in different places: reportedly, the opposite meanings of the verb *to table* created a misunderstanding at a meeting of the Allied forces during WWII, because in England to table an item on an agenda means to *open it up* for discussion, whereas in America, it means to *remove* it from discussion. Other differences include pronunciation, use of tenses, dates and times,

(Continued on page 44)

Your Respondents May Lose Interest If They Don't Understand



Divided By A Common Language

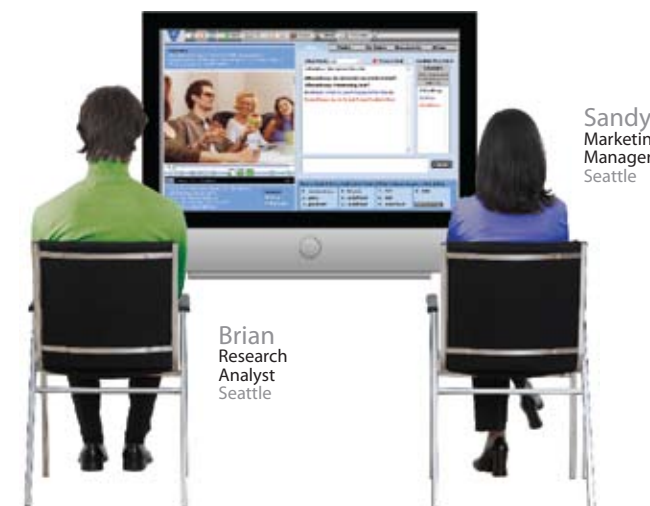
By Jiri Stejskal, Ph.D., CETRA, Inc.



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Ask The Experts

By The Business Services Workgroup, Ed Sugar & Tammie Frost-Norton

What do you do to reward and maintain your best employees? How do you keep your company's door from be a revolving one?

"As you know they are the key to success. We have identified a three part process - based on some principles in Jim Collins' book *Good to Great*. In order to be a great company you need to find something that you : are good at, are passionate about and make money at.

To meet these goals we have the following strategy:

1. Teaching and training; We send people to external courses but we also find that internal 'schools' can be as, if not more, effective. This is where a member of staff teaches other staff.

2. Make money: We try to be competitive with salary and hold reviews every six months. We also share job profitability figures with the wider team so people can see the targets they need to achieve to succeed. Right now there is a quarterly company wide bonus. I am working on a monthly department bonus.

3. Be passionate: this is a tough one. I try to encourage a relaxed but professional environment where there is some laughter- so people can show they enjoy what they are doing. We also try to celebrate success with a monthly Happy Wednesday where

we celebrate birthdays and company anniversaries. We also sound a Gong when we make a sale and sound a whistle when a delivery is made.

This is an ongoing strategy. Sometimes we do better at one than others. But we have a plan."

Owen Jenkins, Kadence Business Research

"For our interviewing staff we make efforts to retain them, but we still have a very high turnover rate. For this group of employees (those who have worked for us for at least six months) we offer:

Mark Rosenkranz
Pacific Market Research

- Free transit cards for public transportation (bus, train, etc)
- Salary draws
- In the past we've offered yoga classes and other similar classes without much interest from employees

- We also have a mentor program for new interviewers/recruiters where they are teamed with experienced staff
 - The mentors appreciate the recognition and the chance to share their knowledge
- While we offer similar benefits for the office staff, we have extremely low turnover."

"I am very proud to say that among the 20 employees we have only two who have been here a year. The others have been with Irwin anywhere from five to 20 years. The first thing we do is teach them to be proud of themselves and let them know they are important to the company.

We feel we are family and keep up with the personal things such as birthdays. Each person is given a card, a small gift on their birthday and usually lunch. We have special occasion parties throughout the year but we also have little surprise luncheons frequently. We did a brown bag last week and fixed each lunch in a bag with a bow. The lunch was fried chicken, french fries and biscuits (real southern). I always

make them a birthday cake. We do a few motivation deals where they have a chance to win tickets to the circus or some special event. Easter we always have a brunch and everyone receives an Easter basket.

We have fun with our employees and show them our appreciation as often as we can but we also have our list of responsibilities, dress code etc. We will have a summer picnic for them and their families; the kids seem to enjoy that. We are very flexible and understand their needs and try to let them know how special they are."

Kathryn Blackburn
Irwin Research

To read more from the experts, please visit:
www.mra-net.org/publications/alertexperts.cfm

To ask Dr. Pete a question, e-mail Pete Cape at pete_cape@surveysampling.com

Dear Dr. Pete:

I don't want to use online research because I've read lots of papers and articles talking about data quality – we never get this with telephone research.

Aidan G. Beller

Dr. Pete replies ...

Dear Aidan,

I guess you've never worked in a telephone unit and seen how concerned they are about data quality.

Not giving honest and thoughtful answers is what leads to poor quality data. Let's take a moment to think about motivations to cheat. Who in the telephone unit has the motive, means and opportunity to cheat? The interviewers, of course. They know the quick way through a questionnaire, which quota cells are full, how to qualify for the survey, etc., and they are in charge of keying in the answers given. That's why the quality spotlight is pointed at the interviewer with random "listening in" call backs to respondents, etc. The same is true of face-to-face interviewing. Of course, this is all private data. No fieldwork company is going to wash its dirty laundry in public when it finds the odd cheat amongst its interviewers.

Now let's look at an online situation. Who has the motive, means and opportunity to cheat? Respondents, of course. But in this scenario there is no way of doing the simple checks you use in telephone research. Panel companies have to be more creative in the ways they catch people trying to "game the system."

So why do they go out and tell the world what they are doing? Simple really; by acknowledging the problem and providing a solution, the panel company has a unique selling proposition that they can use in their marketing. This is your good doctor with his cynic's hat on, of course. Actually, panel companies all have a vested interest in the health of the overall market. If no one had any faith in online research, then all panel companies would be out of business.

Last thought – if you have one cheat in your online survey, then you will have one bit of bad data; if you write a poor questionnaire, it will all be rubbish.

Dr. Pete

Dr. Pete Cape is the Knowledge Director at Survey Sampling International. He can be reached at pete_cape@surveysampling.com.

To read more of Dr. Pete's answers, be sure to check-out the August issue of MRA's eNews.

By Patrick Glaser, CMOR

Over the past three years, no issue has more strongly captured and focused the attention of the research profession than 'data quality.' Ironically, we still have yet to define what 'data quality' truly means.

At its heart, 'data quality' represents the idea that research results should be accurate *and* consistent if the same study is run two or more times – the classic definition of sound research. A concern over a lack of data quality doesn't refer to a single issue or problem, but rather to research as a whole. It is critically important to view data quality, both problems and solutions, in the framework of our principal resource, respondents.

Respondent Origins

Data quality concerns have arisen because of how the research profession's relationship with the respondent has changed over time. The issues below highlight the core areas of concern:

Respondent Cooperation-

A lack of representation due to poor cooperation is a main contributor to the 'data quality' problem. An increase in the number of surveys, lengthening of surveys, expectations of privacy, and other issues has hampered cooperation. The CMOR Research Profession Image Study shows that the biggest reason for refusal to complete surveys is a lack of time and the greatest motivator to participate is a short survey.

Problematically, too often the answer for improving respondent cooperation has been additional follow-up contacts and more aggressive recruitment procedures as opposed to changes to the research design or respondent experience.

Respondent Engagement-

A second area of concern in data quality is the performance of disengaged respondents. Oftentimes, it can be seen that certain respondents will invest too little energy in the survey process, leading to straight-lining, satisficing, or other disingenuous behaviors.

Researchers can examine and check for these poor performing behaviors. However, the root cause of this behavior is the design of the survey instrument. Researchers should think of engagement and survey burden as ethical considerations-equally as important as the other fundamental survey design questions.

Professional & Fraudulent Respondents-

Through the wide use of incentives, the research

Data Quality Seen Through Respondents

profession has created a great motivation for some respondents to participate in research. This issue, which has both positive and negative implications, has largely been contained to panels of respondents who have established relationships with research organizations.

Of course, a positive development has been that many people are now motivated and excited to give their opinion to researchers – feeling a great sense of worth in the process (as well as accomplishment). On the negative side, some respondents participate under false pretenses. Others may simply participate too frequently.

The topic of fraudulent respondents (who illegitimately access surveys) has received enough recognition that a variety of new technologies help to validate respondents and overcome the problem. However, the research profession is still working to understand the implications of whether frequent participation causes a conditioning effect, resulting in a bias on the part of the respondent.

Respondent Coverage-

Coverage is increasingly a problem in all forms of survey research. New methods of communication have offered the U.S. population a greater opportunity to choose unique and customized ways of being contacted and contacting others. This has complicated the landscape for researchers who can no longer depend on one cost effective solution for reaching their target population.

Conclusion

Data quality problems are directly connected to the research profession's relationship with the public. At the same time, every solution that is proposed to deal with a symptom of data quality (i.e. fraudulent, disengaged respondents, refusers, etc.) will also have the potential to affect that relationship with the public. Given this perspective, the need to think through the consequences of these solutions has never been clearer.

Patrick Glaser is the Director of Respondent Cooperation, CMOR. He may be reached at pglaser@cmor.org.

CMOR is the only industry association actively performing the duties of watch dog on federal and senate issues. CMOR's offices are based in Washington, D.C.

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TRAINS, PLANES AND AUTOMOBILES

By Charles DiSogra, Knowledge Networks

Of Trains, Panel Quality, and Sample Coverage

The claim of high-quality research is frequently cited, but upon closer examination, only sometimes earned. This is particularly true for popular opt-in Internet-based Access Panels, which were recently cited in *Business Week* by Gary Langer, Director of Polling at ABC News, as simply “poll-taking clubs.” To corporate shareholders, marketers, and policy makers it is critical that data be accurate and that online recruitment methods be known for these Access Panels to be used properly and the results correctly interpreted. After all, at the heart of online panel quality is the simple need for accuracy and reliability.

To accomplish this, the industry must have comprehensive transparency about the term “Access Panel.” There are, in fact, two classes of Access Panels:

- VAP: Volunteer Access Panel, in which any respondent can join from any venue, and
- NVAP: Non-volunteer Access Panel, in which potential panel members are chosen by the research company by a statistically valid sampling method and using a known published sampling frame for that recruitment to establish panel representativeness.

Using this distinction, our industry clients can understand the differences between the two in areas such as coverage bias, self-selection bias, and non-response bias. These definitional differences affect how one would select the correct Access Panel ‘class’ to use to meet the need of the study being contemplated.

In simple terms we can ask if the recruitment method utilizes known sampling probabilities. What does that mean? Basically, all U.S. households with landline telephones and the members of those households have a known calculated chance for being selected to join an online panel. Knowing

this probability information ensures that samples are as statistically representative as possible, across multiple socio-demographic population characteristics. Ideally, after weighting, most characteristics should be comparable to those published and updated monthly by the U.S. Census Bureau. This scientific approach is the same principle used in the highest quality random-digit dial (RDD) telephone surveys.

Volunteer Access Panels boast impressive numbers of members (in the millions!). They are not derived from a definable population (loosely perhaps “people on the Internet”). The volunteers are not selected using probability methods; their selection probabilities are simply unknowable and cannot be calculated. These opt-in panel members, by definition, self-select to join. We don’t really know who or what these volunteers represent nor how to project any data from them to a larger population – an assessment widely supported by professional survey researchers.

The Great Opt-in Train Robbery

The attractiveness of cheap access to large numbers of online volunteers appeals to many clients. To illustrate: say you want to measure something in the U.S. population. You climb aboard a crowded cross-country passenger train somewhere in the country. Now you go up and down the aisles flashing a sign asking who would like to join a survey panel. Even though many passengers neither see you nor your sign, you succeed in getting some people to say yes. The more train cars you walk through, the more and more volunteers you get. Not bad.

Now you go back to all these volunteers, get some demographic information and ask them your critical study questions. You gather all the data, and while the train passes through a dark tunnel, you wait and adjust these respondents’ characteristics to look like, well, the population of the United States! (Just ignore the possibility that some passengers may be tourists from other countries.) And the answers to those critical study questions are more than suspect, at least.

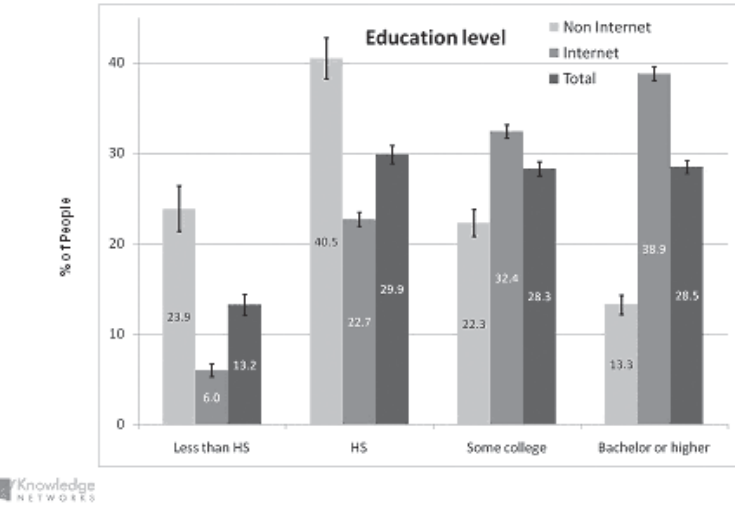
So is this really a research bargain or a proverbial train robbery? Sadly, many who use these Volunteer Access Panels to make important decisions seem to relish the large number of respondents they have, and how well their weighted demographic data line up regardless of the sampling problems.

Coverage and Quality Trump Quantity

Statistics show that about 25% of U.S. households are now without Internet access either by choice or circumstance, and this hurdle will not dissipate: April 2008

research-on-research, shown in the table below, confirms this. Some of the main reasons cited include cost, no service, no computer skills or just disinterest.

Table 1
Education Level





Source detail: KnowledgePanel®, randomly selecting one person per household; data are weighted; confidence intervals computed using a confidence level of 95%.

Staying Ahead of the Curve

For both online panels and telephone-based research, numerous challenges lie ahead in keeping ahead of the curve:

- One is that some segments of the population – e.g., young male adults and urbanites – are becoming harder to reach and less participatory in research.
- Another challenge is the rapidly growing number of U.S. households that are abandoning landline telephones for cell phone only service. Because traditional landline telephones form the basis of a Random Digit Dial sampling frame, solutions must be considered that will capture more cell phone only households. Wider and growing representation will keep us ahead of the curve for the best population coverage in survey research.

Attention to these quality issues and being transparent about sample representation, will empower the marketers who use Access Panels with a clear view of the reliability they so rightly demand. 

Charles DiSogra is the Chief Statistician at Knowledge Networks. He can be reached at cdisogra@knowledge networks.com. 

No Matter Where You Are, You May Be Violating California Law RIGHT NOW

By Howard Fienberg, CMOR

Is your organization's privacy policy conspicuously linked from the front page of your Web site? If not, you may be violating California law – even if you don't reside in or technically do any business in California! Recently, privacy advocates publicly criticized Google for such a violation, before adding such links.

The California Online Privacy Protection Act (OPPA) (Cal. Bus. & Prof. Code 22575-22579) requires conspicuous posting of a privacy policy, and compliance with that policy. **It applies to any research company that "collects and maintains personally identifiable information from a consumer residing in California who uses or visits" online.** This includes research entities based anywhere in the world, whether or not they are even aware that they are collecting such data from Californians.

"research organizations must conspicuously post their privacy policies on their Web sites."

Five Privacy Policy Must-Haves

California's OPPA also has specific criteria expected from any privacy policy (including a research organizations'). The policy should include:

- A list of categories of personally identifiable information (PII) collected;
- A list of categories of third-parties with whom the organization may share such PII;
- A description of the process by which a respondent can review and request changes to PII;
- A description of the process by which the research organization notifies respondents of material

changes to the operator's privacy policy; and


- The effective date of the privacy policy.


Where You Must Post Your Privacy Policy

In addition, under the law, research organizations must **conspicuously** post their privacy policies on their Web sites. What does that mean in practice? Either the privacy policy must appear on the homepage of the Web site or the first significant page after entering the Web site, or the privacy policy must be hyperlinked to the homepage by an icon or text link that contains the word "privacy," and must be in a color different from the background of the homepage.

What Could Happen If You Don't Comply

Research organizations failing to comply with the law or the provisions of their posted privacy policy terms are in violation if such noncompliance is either negligent and material or knowing and willful. Operators have thirty (30) days to post a privacy policy once notified of noncompliance. Ordinary citizens, as well as government agencies, can file suit to enforce the law and bring civil penalties.

For more information on complying with the California Online Privacy Protection Act, researchers should consult the Online Research component of the CMOR Compliance Guide. 

Howard Fienberg is the Director of Government Affairs at CMOR. He can be reached at hfienberg@cmor.org. 

CMOR is the only industry association actively performing the duties of watch dog on federal and senate issues. CMOR's offices are based in Washington, D.C.

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Director - Research (Tourism)

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4. Assist in design & development of market research/customer advocacy programs
5. Present findings/conclusions to clients and conduct action planning sessions

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- * Market research experience (linking customer behavior to business results, qualitative/quantitative research methodologies, tools and analyses).
- * Knowledge of commercial banking/financial institutions.
- * Proficiency in MS Word, Excel, PowerPoint, and Access preferred. SPSS and Confront a plus
- * Ability to manage multiple projects simultaneously
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(Continued on page 42)

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Do You Speak This Type Of English?

(Continued from page 30)

punctuation and numerous other grammatical and lexical dissimilarities.

Beyond UK and US

Microsoft Word 2003 spellchecker lets you choose from no less than 18 varieties of English, listing the following countries: Australia, Belize, Canada, the Caribbean, Hong Kong, India, Indonesia, Ireland, Jamaica, Malaysia, New Zealand, the Philippines, Singapore, South Africa, Trinidad and Tobago, the United Kingdom, the United States and Zimbabwe. As a matter of fact, English is spoken in the following 54 sovereign states and territories: Antigua and Barbuda, Australia, Barbados, Belize, Botswana, Cameroon, Canada, Dominica, Fiji, Ghana, Grenada, Guyana, India, Ireland, Jamaica, Kenya, Kiribati, Lesotho, Liberia, Madagascar, Malawi, Malta, the Marshall Islands, Mauritius, Micronesia, Namibia, Nauru, New Zealand, Nigeria, Pakistan, Palau, Papua New Guinea, the Philippines, Rwanda, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Seychelles, Sierra Leone, Singapore, the Solomon Islands, South Africa, Sudan, Swaziland, the Bahamas, Gambia, Trinidad and Tobago, Uganda, the United Kingdom, the United States, Vanuatu, Zambia and Zimbabwe. In addition, English is the dominant language in 25 non-sovereign entities (such as Hong Kong). The accompanying map shows where English is the dominant language.



In some of the countries listed, English does not have “official” status. It comes as a surprise to most people that among the countries lacking an official language are Australia, the United Kingdom, and – how about that – the United States. On the other hand, in some countries where English is the official language (or one of multiple official languages), the number of native speakers is quite low relative to the country’s population. India, for example, with a population of 1.1 billion, has fewer than 200,000 native speakers of English. According to the Constitution of India, Hindi is the official language and English the ‘subsidiary official language;’ however, English is mandated for the authoritative texts of all federal laws and Supreme Court decisions, and (along with Hindi) is one of the two languages of the Indian Parliament.

Today, approximately 375 million people around the world speak English as their first language, which makes it the third largest language by number of native speakers, following Mandarin Chinese and Spanish. English and Spanish come close in terms of the number of native speakers; consider the fact that about one eighth of the population of the United States are native Spanish speakers. Of course, when we combine native speakers of English with those who speak it as their second language, English is considered the number one language spoken worldwide, even though in this case Chinese comes quite close, too. The trick is to determine what the actual number is of people who speak English as their second language, because of different levels of mastery of the language. Will two semesters of studying English make you an English speaker? Four? Or do you have to use the language on a daily basis to be considered? There are no clear guidelines.

Localization Issues

English is a “pluricentric” language, which means that there is no central language authority like France’s *Académie française*, and therefore no variety is considered the “standard.” In theory there is a concept of “International English,” but in practice the English language in each country has its own peculiarities and “International English” is not being used, simply because most people don’t even know it exists, and also because there is currently no consensus as to exactly what it means.

To keep track of multiple English versions, it is advisable to use ISO country codes in the file name, for example: “surveyname_ENG_GBR.doc” where “ENG”

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What Did You Say?

(Continued from page 44)

identifies the language (English) and “GBR” identifies the country (United Kingdom). Software localizers typically use two-letter codes (for example, “en_gb”). Both 3-letter and 2-letter code lists are defined in ISO 639 and ISO 3166 respectively. The 2-letter country codes are also used on the Web (for example, www.deutschland-tourismus.de is a German site).

Even though people in England, Canada, India or Australia will have no difficulties understanding American English, it is an established practice to provide localized versions when conducting marketing research in different English-speaking countries. Localization (or “localisation” as the Brits would have it) goes beyond replacing “color” with “colour.” Consider the screener part of a survey. Currencies need to be localized, and sometimes the income breaks as well – respondents in India will have very different

incomes than those in Singapore. The same applies to educational levels – not every country uses the same educational system.

While the cost of localization for multiple English-speaking countries is significantly lower than the cost of preparing a survey for countries where languages other than English are spoken, it is a cost nonetheless and needs to be budgeted for marketing research projects. Do-it-yourself solutions might work if you have a branch in the target country or if your client has a presence in the target country and can take on the localization.

Running a U.S. survey through a U.K. (or Indian, or Australian, etc.) spellchecker in MS Word will not do the trick and if you do not have in-country resources, you would be well advised to use a professional language service. A language service provider will be able to advise on various language issues (for example, do you need to localize a U.S. survey for Canada?) and will help you navigate the intricacies of localization.

Jiri Stejskal, Ph.D., is the President of CETRA, Inc. He can be reached at jiri@cetra.com.



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1.) How long have you worked in the MR profession?

I have been in the marketing research profession for over 30 years, beginning in the advertising agency business as an account executive and later account planner.

2.) What positions/titles have you held?

I started my career at the top, as president of Adscape, a student run advertising agency, then came down to earth as an Account Executive and later Account Planner at several Dallas area Advertising Agencies. I became President and Partner at Dillard-Lavine Advertising and Marketing in 1982 and Founder and President of Common Knowledge Research Services in 1988. My present position is CEO of Common Knowledge, a member of the Toluna Group.

3.) What does the PRC certification mean to you?

It means that I am a recognized professional, who can be depended upon by my clients for understanding their needs and expert advice when called for. It means our clients can view me as someone who has made the effort to keep my research knowledge and skills sharp and can guide them through the latest and greatest our industry has to offer.

4.) What interested you in the PRC program?

I wanted our clients and prospects to know that we take knowledge and understanding of their business seriously. It is also a great way for me, as a manager, to know that my staff is getting an opportunity and encouragement to stay current with industry trends.


5.) How have you encouraged your employees to gain certification?

Common Knowledge requires PRC certification for all eligible employees and is proud of the continued effort we are making to maintain our certifications through continuing education.

6.) In your opinion, should market research professionals earn the PRC designation? Why?

As in any industry, there are those who take orders and those that can provide a valuable contribution or consultative sale. This designation helps identify those who can help make a strong contribution to the research process, wherever in that process they may be. The value in requiring continued education means that we each have an opportunity to keep informed and up to date on the problems facing our industry as well as the latest solutions and techniques used to solve those problems.

7.) In your opinion, what are the three most valuable things your PRC designation provides you, professionally and personally?

- The PRC designation encourages me to keep current in our industry.
- It provides a clear communication that I am someone who can contribute to helping others with their research needs.
- Through the certification of my staff, it helps me to know they will also be staying up to date and knowledgeable regarding the needs of our industry. 

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Profession News/Announcements


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Survey Sampling International raised \$40,000 for Asia as a part of their In Our Thoughts Campaign.
- 


CETRA, Inc. has added Sign Language Interpretation to its translation services.
- 


The Praxi Group hired **Roxanne Salen** as Project Coordinator.
- 


Proudfoot Consulting named **John Manrodt** and **John Klustner** as Senior Vice Presidents.
- 


EMI Surveys hired **Tony Brown** as a Sales Executive.
- 

Cashman + Katz Integrated Communications of Glastonbury, has hired **Joni Krasusky** as Director of its research facility, Connecticut InFocus.
- 

Itracks formed a partnership with **GroupNet**.
- 

G&S Research hired **Jorge Rodriguez** as Director of Client Services; **Alicia Moody** as Graphics and Reporting Specialist; and **Stacia Murphy** as a new Data Specialist.
- 


Kadence has expanded to China with the opening of a **Hong Kong office**.
- 

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