QUICK QUALITY
QUANTITATIVE

KEY CONSIDERATIONS ON HOW TO RUN
A PROJECT QUICKLY WITHOUT
COMPROMISING QUALITY

INSIGHTS AND INFORMATION EXCHANGE
ATLANTA, JUNE 17, 2015
AGENDA

Today’s Discussion Topics

- Differences among respondent sources
- Panel versus dynamic sources
- Source type blending
- Sampling versus routing
- Sample balancing options
- Survey design tips
- Survey health
- Project plan checklist
HOW ARE PANEL AND DYNAMIC SOURCING DIFFERENT?

• First of all River has not existed for several years

• The industry is now comprised of Research Panels and Panel Aggregators

• Panel Aggregators and other non-research panel sources are collectively called Dynamic Sources.
  ◦ Affiliate (almost nonexistent)
  ◦ Social media
  ◦ Rewards and Loyalty Programs
  ◦ Gamers
  ◦ Re-purposed research panel screen-outs
DYNAMIC SOURCES ARE NOT PROVIDING FRESH RESPONDENTS

<table>
<thead>
<tr>
<th>QUESTIONS INDICATING SURVEY EXPERIENCE</th>
<th>PANEL (n=1209)</th>
<th>DYNAMIC (n=2512)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average minutes prior to this survey spent answering survey questions today</td>
<td>16.4</td>
<td>28.8</td>
</tr>
<tr>
<td>Average number of online surveys completed per month for any research organization</td>
<td>30.4</td>
<td>41.2</td>
</tr>
<tr>
<td>Average number of panels received communication from in past 6 months (out of 27 panels)</td>
<td>6.5</td>
<td>8.0</td>
</tr>
</tbody>
</table>

Base = All respondents completing the survey; weighted data
SYSTEMATIC DEMOGRAPHIC DIFFERENCES EXIST BETWEEN PANEL AND DYNAMIC SOURCES

- HH Income >75K: Panel 34%, Dynamic Sources 25%
- No kids in HH: Panel 72%, Dynamic Sources 65%
- Working full-time: Panel 44%, Dynamic Sources 37%
- BA or above: Panel 47%, Dynamic Sources 34%

*Grouping of major US panels (both Lightspeed and non-Lightspeed sources)
WHEN YOU HAVE DEMOGRAPHIC DIFFERENCES
YOU TEND TO ALSO HAVE BEHAVIORAL DIFFERENCES

% Smoke Cigarettes

Panel: 14%
Dynamic Sources: 28%
DYNAMIC SOURCES ARE MORE OPTIMISTIC

SALTED SNACK CONCEPT PURCHASE INTENT

Panel

- Probably will buy: 10%
- Definitely will buy: 23%

Dynamic

- Probably will buy: 21%
- Definitely will buy: 34%

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Mainstream respondents more likely to find flavored beer appealing:

<table>
<thead>
<tr>
<th>COLUMN %</th>
<th>MYSURVEY</th>
<th>MAINSTREAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very appealing</td>
<td>8%</td>
<td>35%</td>
</tr>
<tr>
<td>Appealing</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Neither appealing nor unappealing</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Unappealing</td>
<td>33%</td>
<td>14%</td>
</tr>
<tr>
<td>Not at all appealing</td>
<td>17%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Total sample; Unweighted; base n = 563
Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)
DYNAMIC SOURCES TEND TO LIKE EVERYTHING MORE

HOW MUCH DO YOU ENJOY THE COMMERCIALS ON TELEVISION? (VERY MUCH) - REGULAR VS. REVERSED SCALES BY SOURCE

Panel
- Very much - regular scales: 4%
- Very much - reversed scales: 3%

Dynamic Sources
- Very much - regular scales: 12%
- Very much - reversed scales: 8%
IN ADDITION TO BEING MORE POSITIVE, DYNAMICALLY SOURCED RESPONDENTS ALSO TEND TO BE LESS ATTENTIVE

POTATO CHIPS CONCEPT PI (TOP 2 BOX) - REGULAR VS. REVERSED SCALES BY SOURCE

Panel
- Top 2 Box - regular scales: 26%
- Top 2 Box - reversed scales: 28%

Dynamic Sources
- Top 2 Box - regular scales: 43%
- Top 2 Box - reversed scales: 31%
DYNAMIC SOURCES REQUIRE MORE QUALITY CONTROL

- **Do you have 3 or more cats?**
  - Dynamic Sources: 7%
  - Panel: 12%

- **Have you gone to hear an author speak live about their book in the last year?**
  - Dynamic Sources: 8%
  - Panel: 11%

- **Have you run a half marathon or full marathon in the past 12 months?**
  - Dynamic Sources: 6%
  - Panel: 13%

- **Do you own a kayak?**
  - Dynamic Sources: 4%
  - Panel: 7%

- **Have you been issued a speeding ticket in the past 6 months?**
  - Dynamic Sources: 3%
  - Panel: 6%
RECOMMENDATIONS
FOR RESPONDENT SOURCING

• Be aware of the differences by respondent source
• If you need to add additional sources, stick with a similar source type – Panel or Dynamic Source
• Dynamic sources tend to be:
  ◦ More frequent survey takers
  ◦ More Positive
  ◦ Skew less educated, more ethnic, lower income
  ◦ Less attentive
  ◦ More over-claiming
# BLENDING

## SALTED SNACK CONCEPT PURCHASE INTENT

*Base data showing the difference between MySurvey and Mainstream*

<table>
<thead>
<tr>
<th>Top-2 Box – Salted Snack Concept</th>
<th>18-34 Male</th>
<th>18-34 Female</th>
<th>35-54 Male</th>
<th>35-54 Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>MySurvey (MYS)</td>
<td>40.6%</td>
<td>36.8%</td>
<td>30.1%</td>
<td>28.4%</td>
</tr>
<tr>
<td>Mainstream (MS)</td>
<td>61.9%</td>
<td>46.9%</td>
<td>48.5%</td>
<td>44.1%</td>
</tr>
</tbody>
</table>

*Estimated blending impact by source by age / gender*

<table>
<thead>
<tr>
<th>Top-2 Box – Salted Snack Concept</th>
<th>100% MYS</th>
<th>90% MYS / 10% MS</th>
<th>85% MYS / 15% MS</th>
<th>80% MYS / 20% MS</th>
<th>70% MYS / 30% MS</th>
<th>50% MYS / 50% MS</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34 Male</td>
<td>40.6%</td>
<td>42.7%</td>
<td>43.8%</td>
<td>44.9%</td>
<td>47.0%</td>
<td>51.3%</td>
</tr>
<tr>
<td>18-34 Female</td>
<td>36.8%</td>
<td>37.8%</td>
<td>38.3%</td>
<td>38.8%</td>
<td>39.8%</td>
<td>41.9%</td>
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## BLENDDING

### SMOKING

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<td>36.0%</td>
<td>35.7%</td>
</tr>
<tr>
<td>18-34 Female</td>
<td>14.0%</td>
<td>14.8%</td>
<td>15.2%</td>
<td>15.7%</td>
<td>16.5%</td>
<td>18.2%</td>
</tr>
<tr>
<td>35-54 Male</td>
<td>18.7%</td>
<td>20.5%</td>
<td>21.4%</td>
<td>22.3%</td>
<td>24.1%</td>
<td>27.7%</td>
</tr>
<tr>
<td>35-54 Female</td>
<td>12.3%</td>
<td>14.2%</td>
<td>15.1%</td>
<td>16.0%</td>
<td>17.9%</td>
<td>21.7%</td>
</tr>
</tbody>
</table>
BLENDING RECOMMENDATIONS

• We blend form the start of the start of the survey because of the speed of filling by source
• Consistency by source type is important:
  ◦ By age/gender quota group
• Tracking projects – data shifts likely if source type blending ratios not maintained
• Introduce changes over time
• Demographic differences by source type can be complimentary, find blend that brings you closest to benchmark data
SAMPLE SELECTION TODAY

ROUTER

Directing respondent traffic to multiple studies using either serial or parallel screening. Quotas controlled for several studies.

TRADITIONAL SAMPLING

Selecting respondent to qualify for one study. Quotas controlled for one study.
TRADITIONAL DIRECT SAMPLING

Panel Respondents selected for specific sample

Survey

Dis-qualifieds or quota-fulls

- Survey quotas are managed for one specific study
- Sample designed to control for selected variables
- Sample designed and selected based on a specific study needs
ROUTER SAMPLE

- Efficient use of respondents
- No process to monitor non controlled variables
- Survey quotas determine sample assignment along with pre-screening
### SAMPLE AND SURVEY QUOTAS

#### REGION

<table>
<thead>
<tr>
<th>Region</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>18.1%</td>
</tr>
<tr>
<td>Midwest</td>
<td>21.3%</td>
</tr>
<tr>
<td>South</td>
<td>37.1%</td>
</tr>
<tr>
<td>West</td>
<td>23.4%</td>
</tr>
</tbody>
</table>

#### INCOME

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$30,000</td>
<td>23.3%</td>
</tr>
<tr>
<td>$30,000-$50,000</td>
<td>17.8%</td>
</tr>
<tr>
<td>$50,000-$75,000</td>
<td>18.4%</td>
</tr>
<tr>
<td>$75,000+</td>
<td>40.5%</td>
</tr>
</tbody>
</table>

#### HOUSEHOLD SIZE

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Member</td>
<td>14.2%</td>
</tr>
<tr>
<td>2 Members</td>
<td>34.1%</td>
</tr>
<tr>
<td>3+ Members</td>
<td>51.8%</td>
</tr>
</tbody>
</table>

#### INTERLOCKED AGE & GENDER

<table>
<thead>
<tr>
<th>Age &amp; Gender</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male 18-29</td>
<td>10.9%</td>
</tr>
<tr>
<td>Male 30-39</td>
<td>8.3%</td>
</tr>
<tr>
<td>Male 40-49</td>
<td>8.7%</td>
</tr>
<tr>
<td>Male 50-59</td>
<td>8.9%</td>
</tr>
<tr>
<td>Male 60+</td>
<td>11.6%</td>
</tr>
<tr>
<td>Female 18-29</td>
<td>10.7%</td>
</tr>
<tr>
<td>Female 30-39</td>
<td>8.5%</td>
</tr>
<tr>
<td>Female 40-49</td>
<td>9.0%</td>
</tr>
<tr>
<td>Female 50-59</td>
<td>9.4%</td>
</tr>
<tr>
<td>Female 60+</td>
<td>14.1%</td>
</tr>
</tbody>
</table>

**Cell 1**
- All 4 variables were used for balancing quotas.
- Region and interlocked Age/Gender for survey quotas.

**Cell 2**
- Only Region and interlocked Age/Gender were used for both the balancing quotas and survey quotas.
WEIGHTING

- Survey completes were weighted to US Census
- RIM Weighting techniques were used to align sample data with US Census to increase sample accuracy.
- Cases were proportionally aligned with each target
- Weights were applied on a marginal distribution rather than interlocking for simplification
- Considered an efficient and deterministic process for checking sample variances

John Bremer (2013)

“The most effective use of weighting is a companion to the sampling process.”
# General Results – Weighting Efficiencies

<table>
<thead>
<tr>
<th>WEIGHT</th>
<th>Minimum Weight</th>
<th>Maximum Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weighting Efficiency</td>
<td>95.9%</td>
<td>0.66</td>
</tr>
<tr>
<td></td>
<td>76.4%</td>
<td>0.39</td>
</tr>
</tbody>
</table>

**General Guidelines for Efficiencies and Weight**

- >75% efficiency
- 3 or less for weights

- 100% weighting efficiencies is achieved when the sample has the exact same proportions as the population on all weight variables

- The lower weighting efficiencies, the higher the uncertainty in the data
SAMPLING EFFICIENCY BY
COMBINATION OF WEIGHT VARIABLES ACROSS CELLS

CELL 1

Region  Sex-Age  Income  Household Size
100  100  99  98
Combine weight all demos  96

CELL 2

Region  Sex-Age  Income  Household Size
100  100  84  92
Combined weight all demos  76
Cell 2 consisted of significant differences when compared to census prior to weighting.
DETAILED DEMOGRAPHIC ANALYSIS – HOUSEHOLD SIZE

1 Member: 3.1% Cell 1, 7.2% Cell 2
2 Members: 4.7% Cell 1, 6.6% Cell 2
3+ Members: -7.8% Cell 1, -13.8% Cell 2

Population Target:
- 3.1% Cell 1, 4.7% Cell 2
- 7.2% Cell 1, 6.6% Cell 2
- -7.8% Cell 1, -13.8% Cell 2
SAMPLING RECOMMENDATIONS

• Always consider which balancing variables are important for that study
  Presence of children – toy study
  Regions – retail study

• Non-controlled variables will skew according to the underlying respondent source skew.

• Weighting can fix data to a point
SURVEY HEALTH
THE SURVEY JOURNEY

“A journey of a thousand miles begins with a single step”

— Confucius
DEVICES?
YOUR SURVEY

Q1 Which of these xxxxx are you aware of?
Not heard of
Heard of

Combining awareness, usage and liking...

Q2 Pur
Not

Q3 Do
Like
Love
QUESTION ARTS COMPONENT TYPES

- Row Picker
- Drag-n-Drop
- Drag-n-Flag
- click-n-Fly
- Star Rating
- Slider Matrix
- Linked Slider
- Scrolling Matrix
QUESTIONS…

Please read through the statements shown below and select which statement best describes your attitude towards this brand. Please select the most appropriate statement per brand.

Which of these statements best describes your attitude towards each brand?
DROP OUT

If more than 1% of people are dropping out on an individual question that is a sign of a problem question.

If more than 20% of people are not completing your survey this is a sign of a problem survey.

WHAT'S YOUR SURVEY COMPLETION RATE?

90%WIN A PRIZE!
80%REACHED YOUR TARGET
70%START TO WORRY
60%GO TO SURVEY HOSPITAL
SO WHAT NOW?

Survey Health:

Taking the pulse of your survey.
DASHBOARD
small change...

BIG difference!
PRACTICE WHAT WE PREACH
PRACTICE WHAT WE PREACH

SHS: 62  SHS: 66  SHS: 60
SHS: 78  SHS: 88  SHS: 80
10 TIPS FOR AN ENGAGING SURVEY

1. Think like a respondent
2. Adopt an iterative design approach
3. Hunt out the redundant questions
4. Apply question level caps & quotas
5. Don’t be afraid to model, ascribe & chunk
6. Combine and nest questions making best use of iconography
7. Switch to shorter more effective question techniques
8. Ask better questions
9. When designing your survey think of the sacred viewing zone & make every pixel count
10. Write questions like a tweeter
QQQ SUMMARY

- Taking the pulse and act on results
- Lose redundant questions, Engage your sample
- Be aware differences by respondent source
- Consistency regardless of source and type
- Sample variables need to be controlled...
- Accessible through all devices

Which sample should I use?

How do I blend my multiple samples?

Router vs Normal

All Devices

Survey Health

Question Types

Research Quality