

Global Patterns in Panel Research

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Harvesting Quality Data...since 1979


Objectives

- **Compare Global and American panel patterns.**
- **Demonstrate trends in panel evolution.**
- **Illuminate how various problem respondents, through their impact on purchasing data, drive evolutionary changes.**
- **Clarify the issues that now confront the American Panels.**
- **Arrive at workable solutions---blending methodologies.**

I can see clearly now!

- Compared survey results from 12 US Consumer Panels, 1 panel in each of twenty-five global markets. 400 completes per source. June 2008 - February 2009.

We are grateful to our research partners for providing sample for the following global (non US) markets.

-  17- global panels-Argentina, Brazil, Czech Republic, Denmark, Finland, France, Germany, Italy, Norway, Poland, Portugal, Russia, Spain, Sweden, Switzerland, UK, Ukraine

- *Clear Voice Research*-Australia, Canada

-  -China, Japan, South Korea, Singapore, Hong Kong, Taiwan

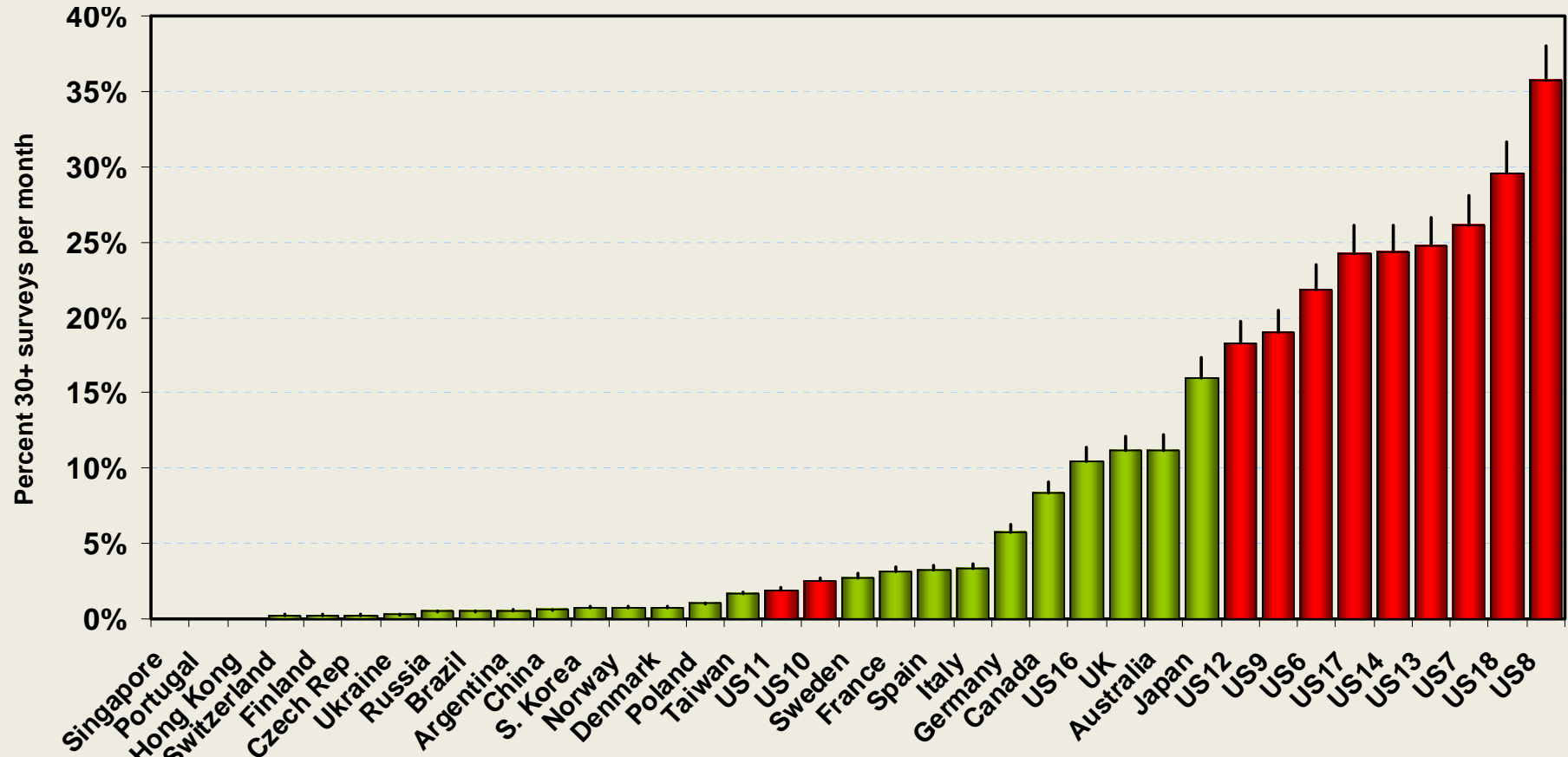
Methods

- **Selected demographic quotas (age, income, gender, ethnicity) were used to simulate census.**
- **Median length was 15 minutes.**
- **Questions covered: Technology and the media, Participation in market research, Buyer Behavior, Values and lifestyle, Demographics, Questionnaire Satisfaction.**

Respondent Types

- **Professional Respondents** fall into four categories:
 - (1) Self report taking on-line Surveys “practically every day”.
 - (2) Self report (open ended) taking over 30 online surveys “in the past month”.
 - (3) Multiple panel membership ≥ 5 panels.
 - (4) Respondent panel tenure.
- **Inconsistency:** Brand vs. Price, Price vs. Brand, Happy with standard of living vs. unhappy with standard of living.
- **Failure to follow instructions:** Instructed to enter a predetermined answer.
- **Speeders:** Lowest 10% of survey lengths.

Percent Respondents Doing More than 30 Surveys/Month



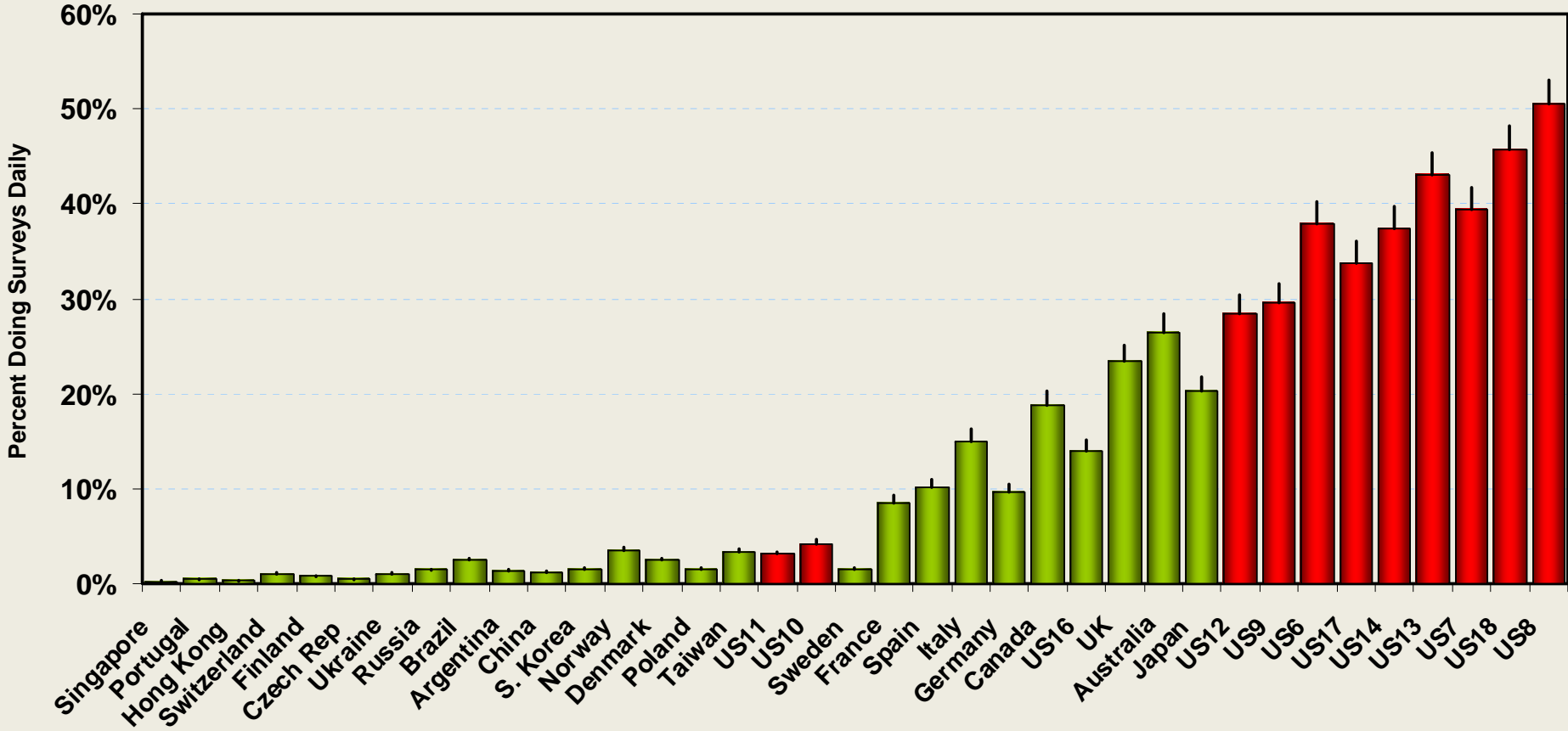
US11=River

US10= Social Network

Red = US Panels

Green = International Panels

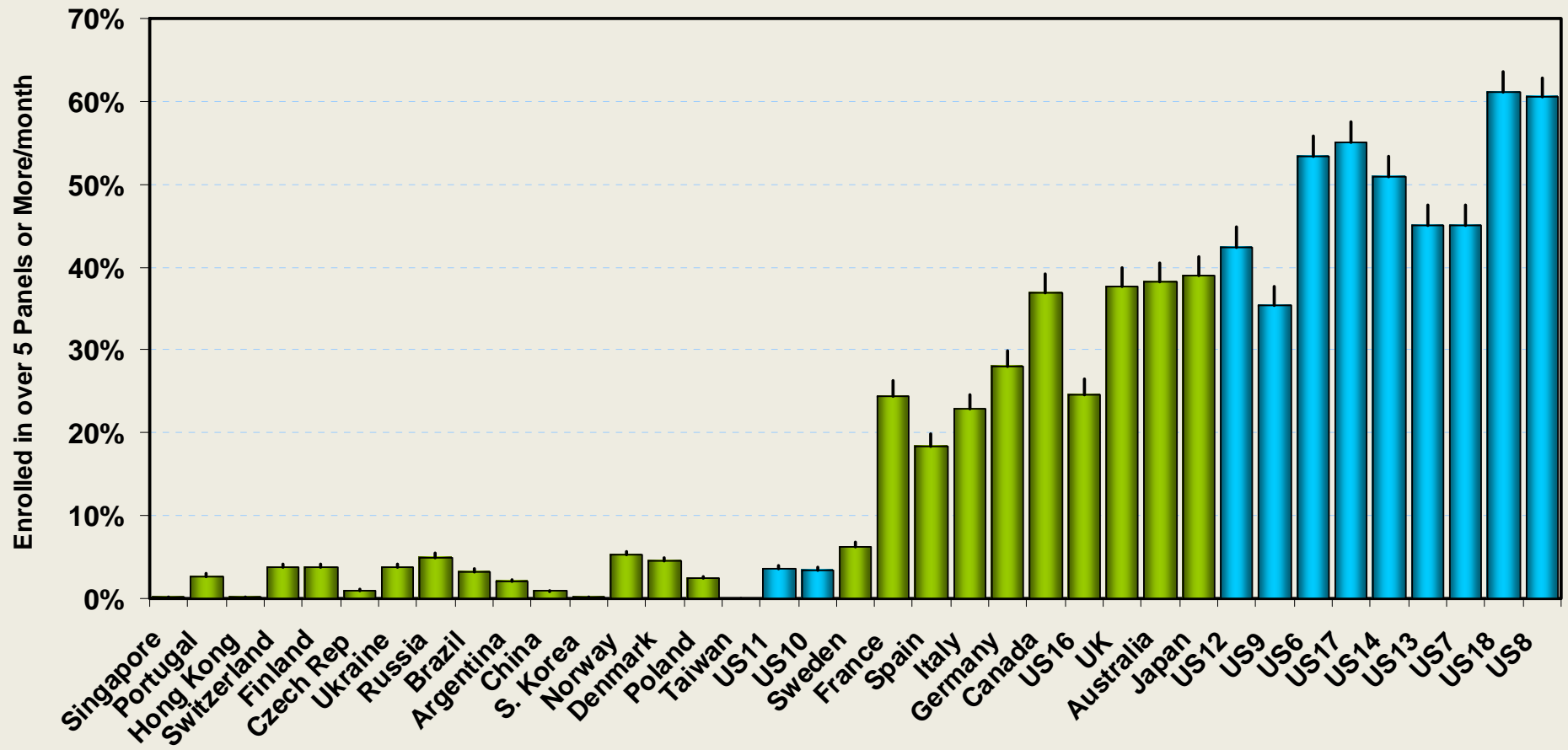
Percent Respondents Doing Surveys Every Day



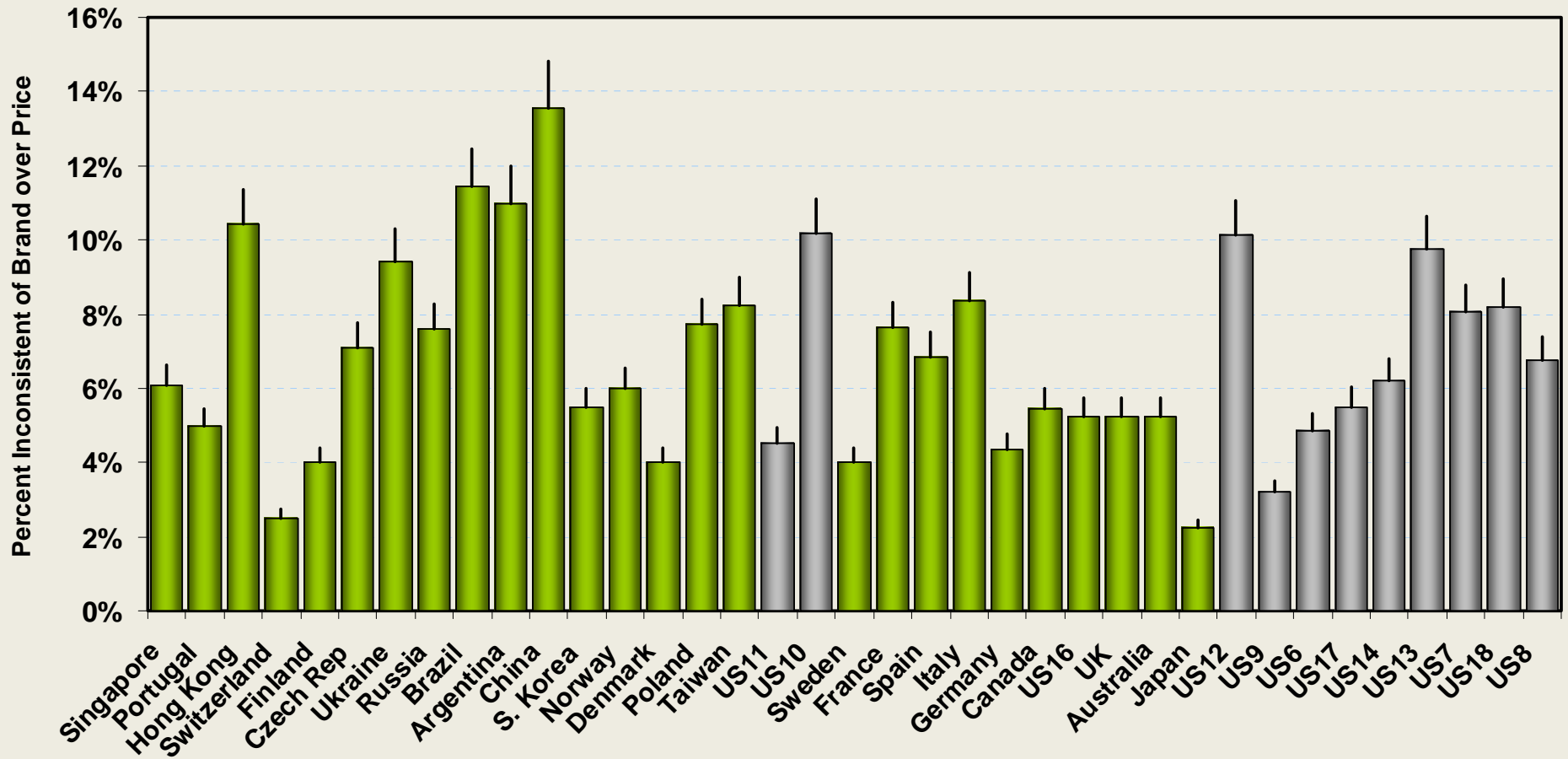
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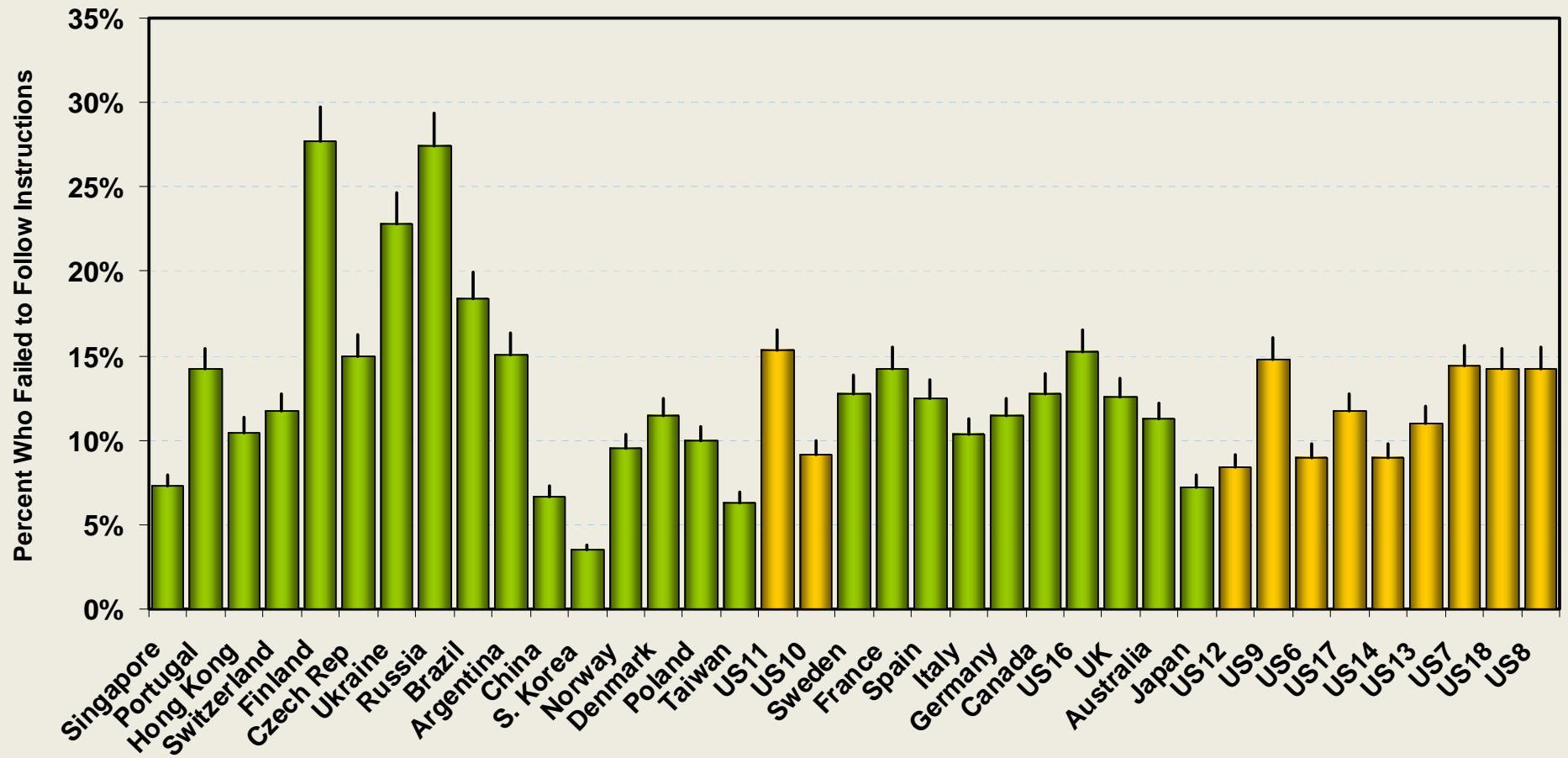
Percent Respondents Enrolled in > 4 Panels



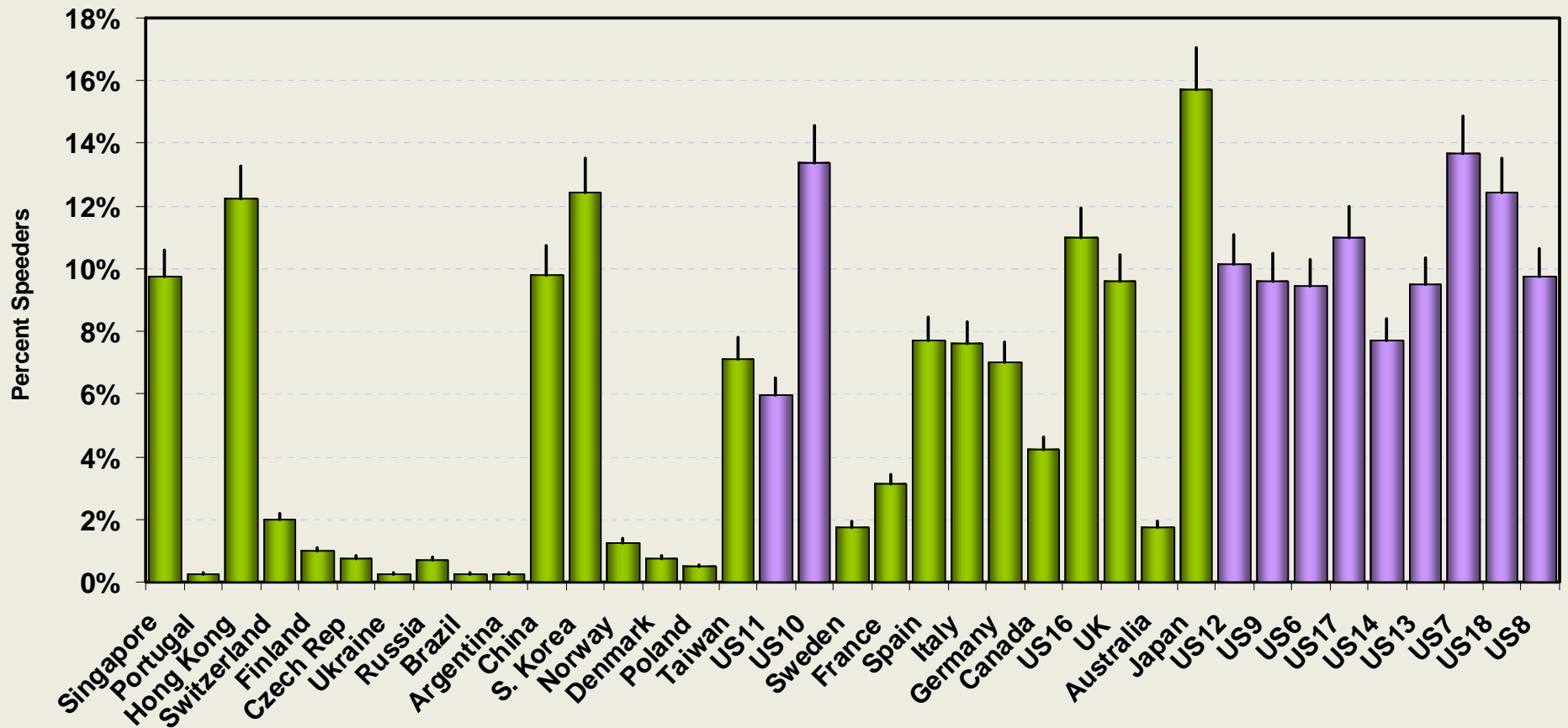
Percent Respondents Who had an Inconsistent Brand Over Price Response



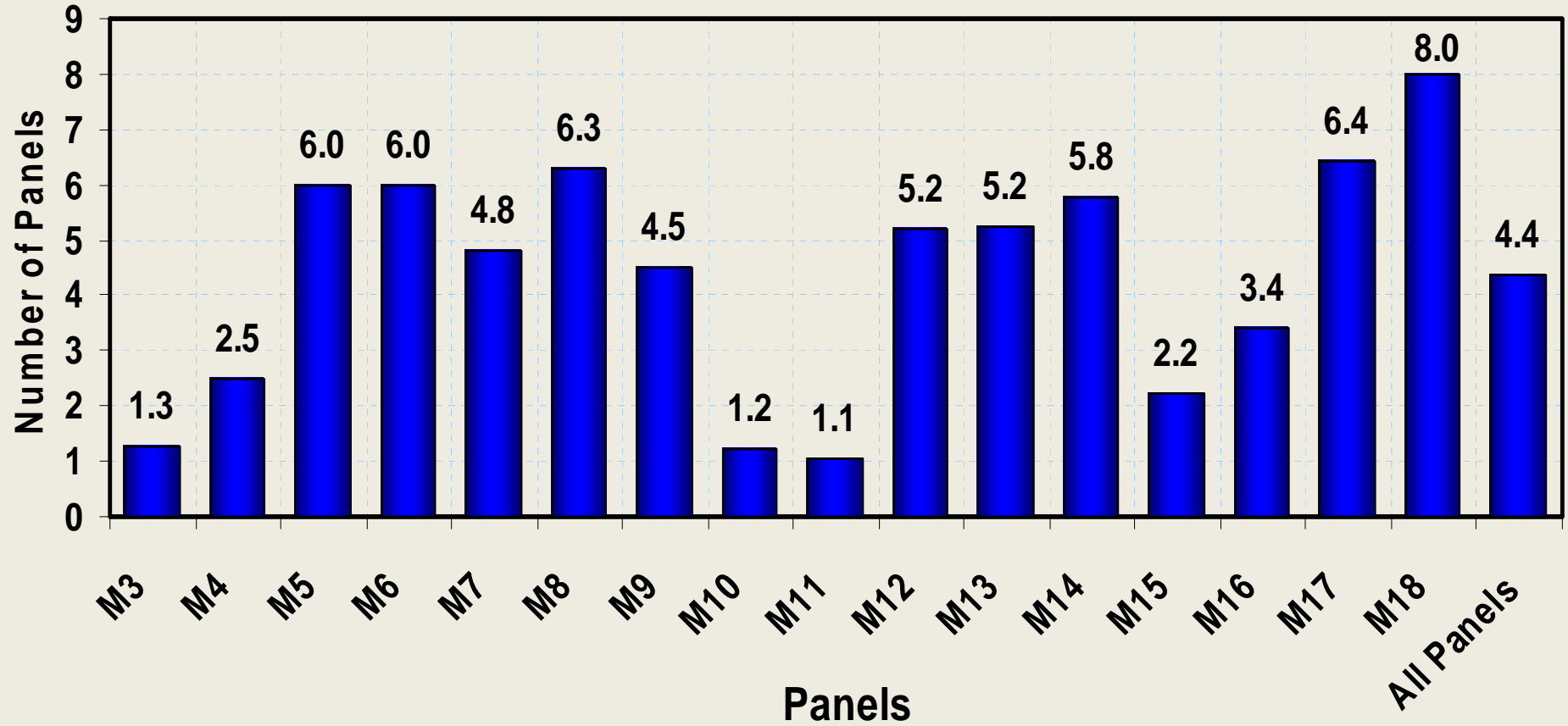
Percent Respondents Who Failed to Follow Instructions by Panel



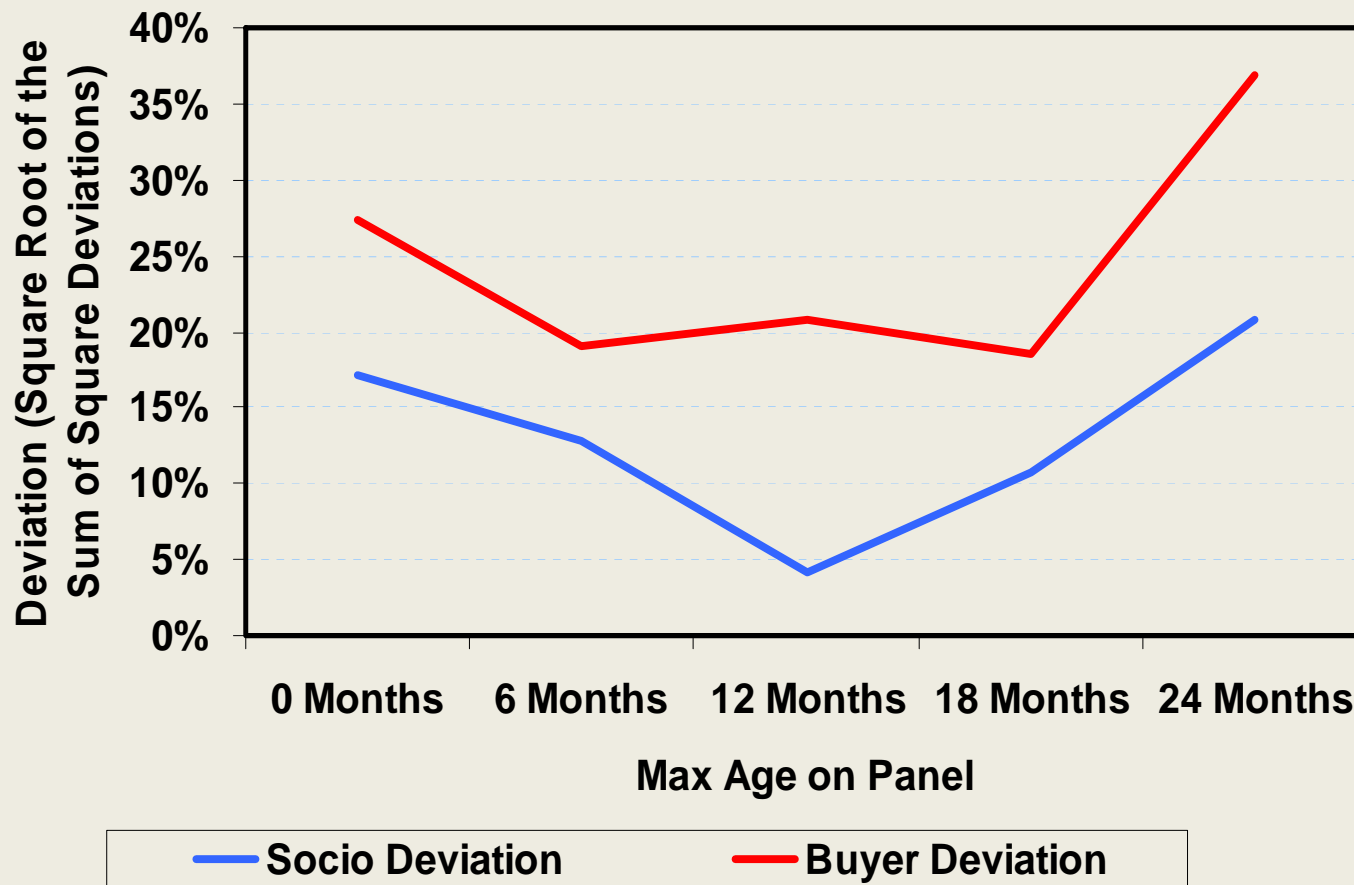
Percent Respondents Who are Speeders by Panel



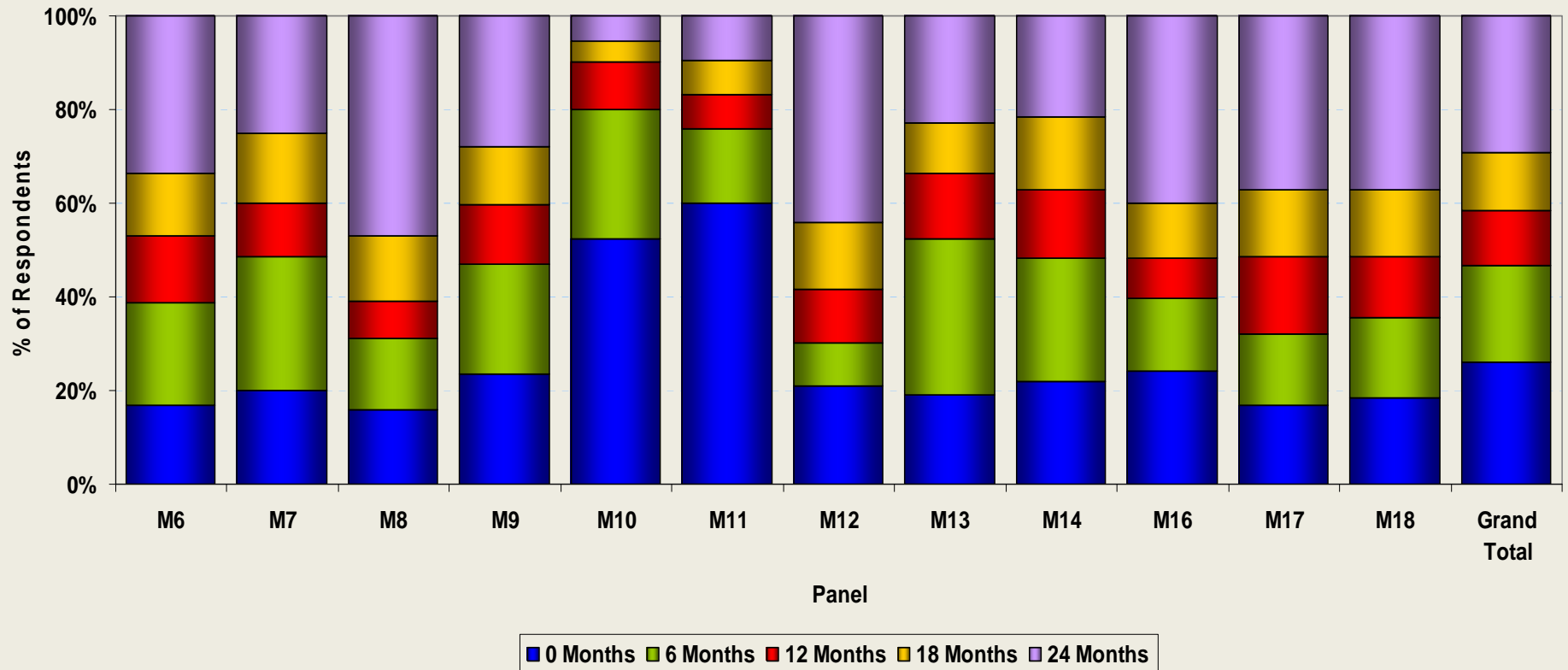
Average Panel Membership by Panel in the U.S.



Impact of Max Panel Age in the U.S. on Sociologic and Buyer Segmentations



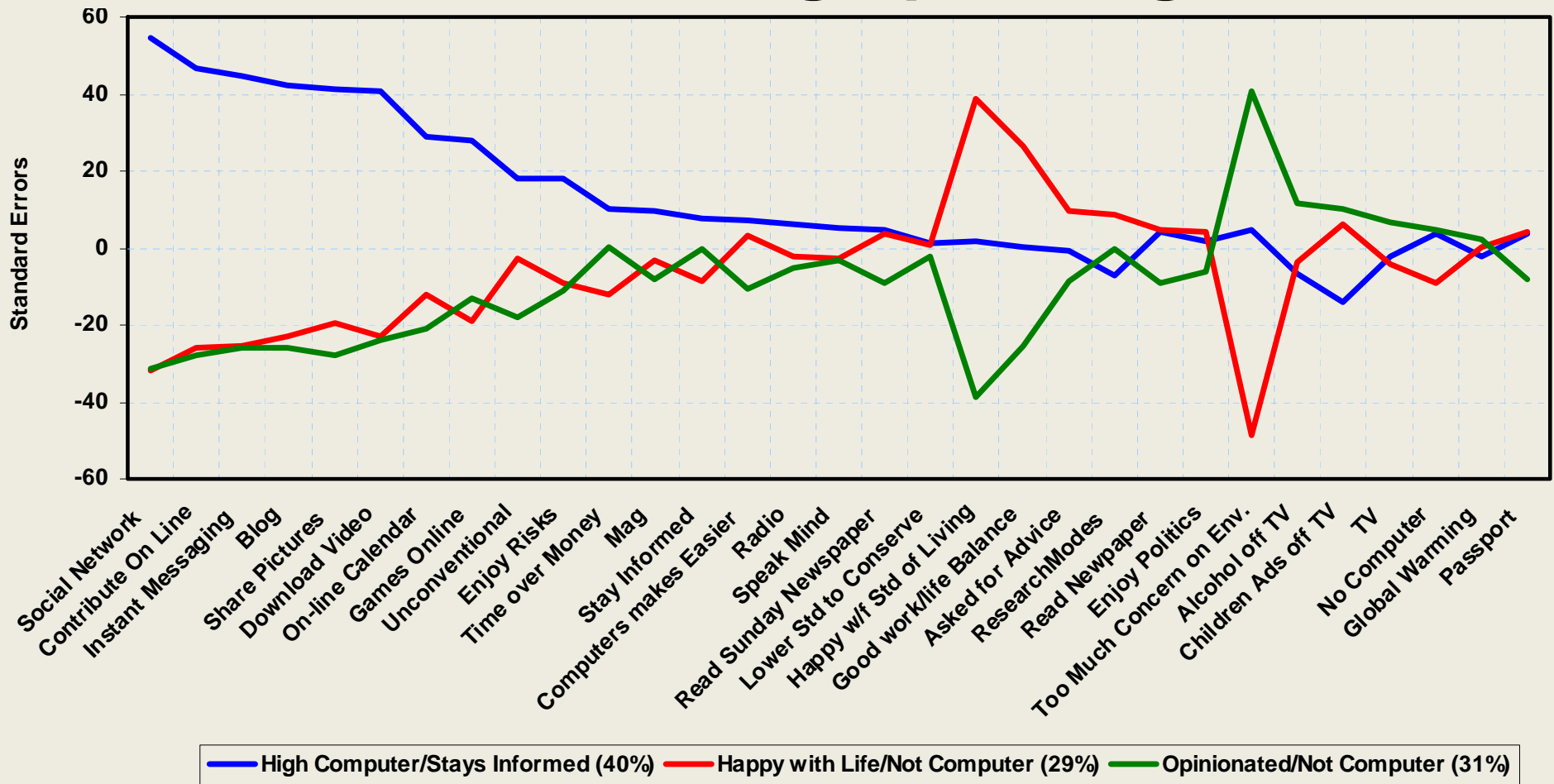
Max Age on Panel by Panel in the U.S.



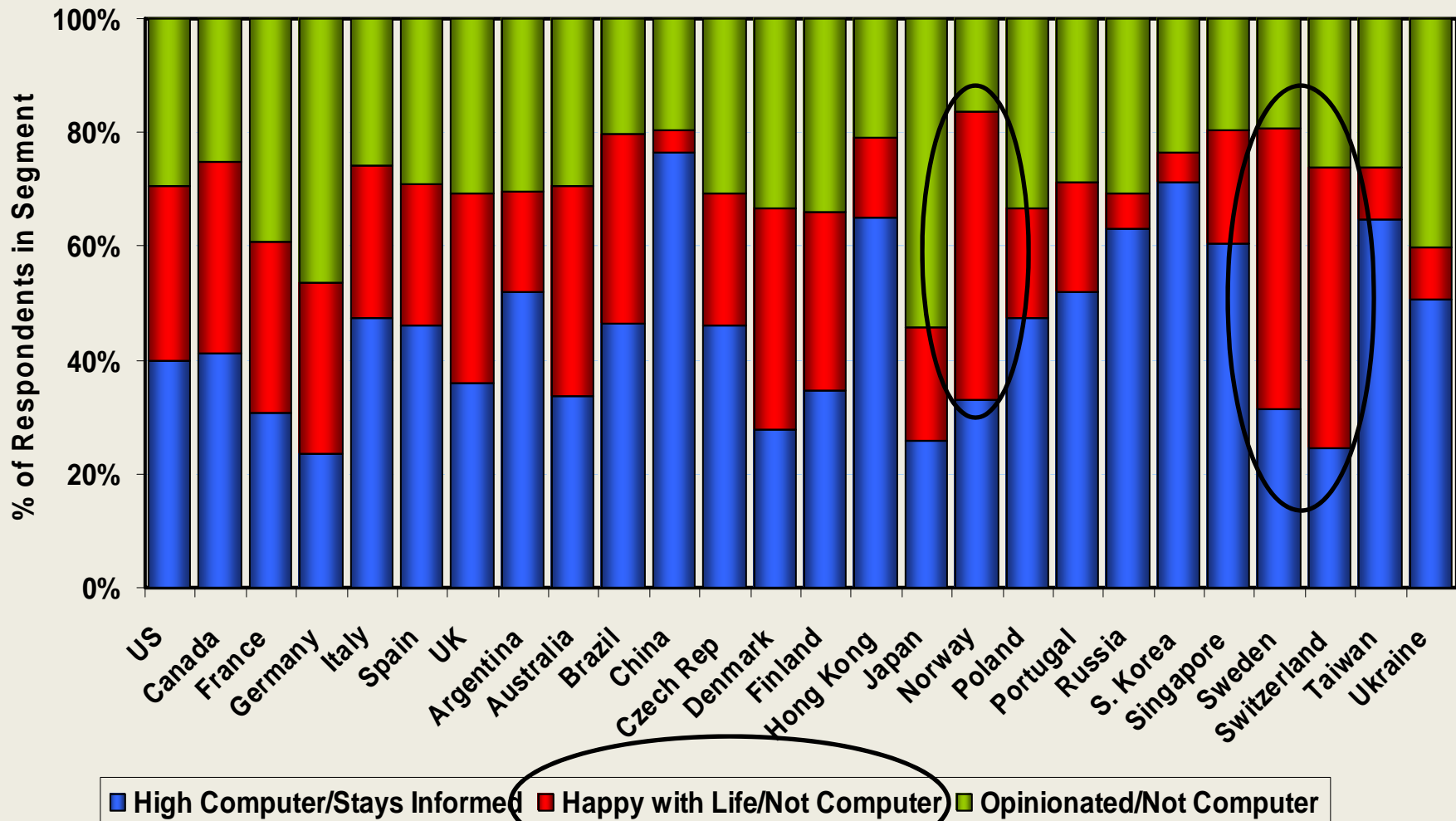
Social/Psychographic Variation

- **Social opinions and behavior can be expected to drive purchasing behavior or at least provide a basis for segmenting the market. Consistency of these measurement may likewise be critical.**
- **Variables Groups**
 - Internet Use
 - Taking Surveys
 - Having a Passport
 - Social Characteristics
- **Measures:**
 - Driving Variables

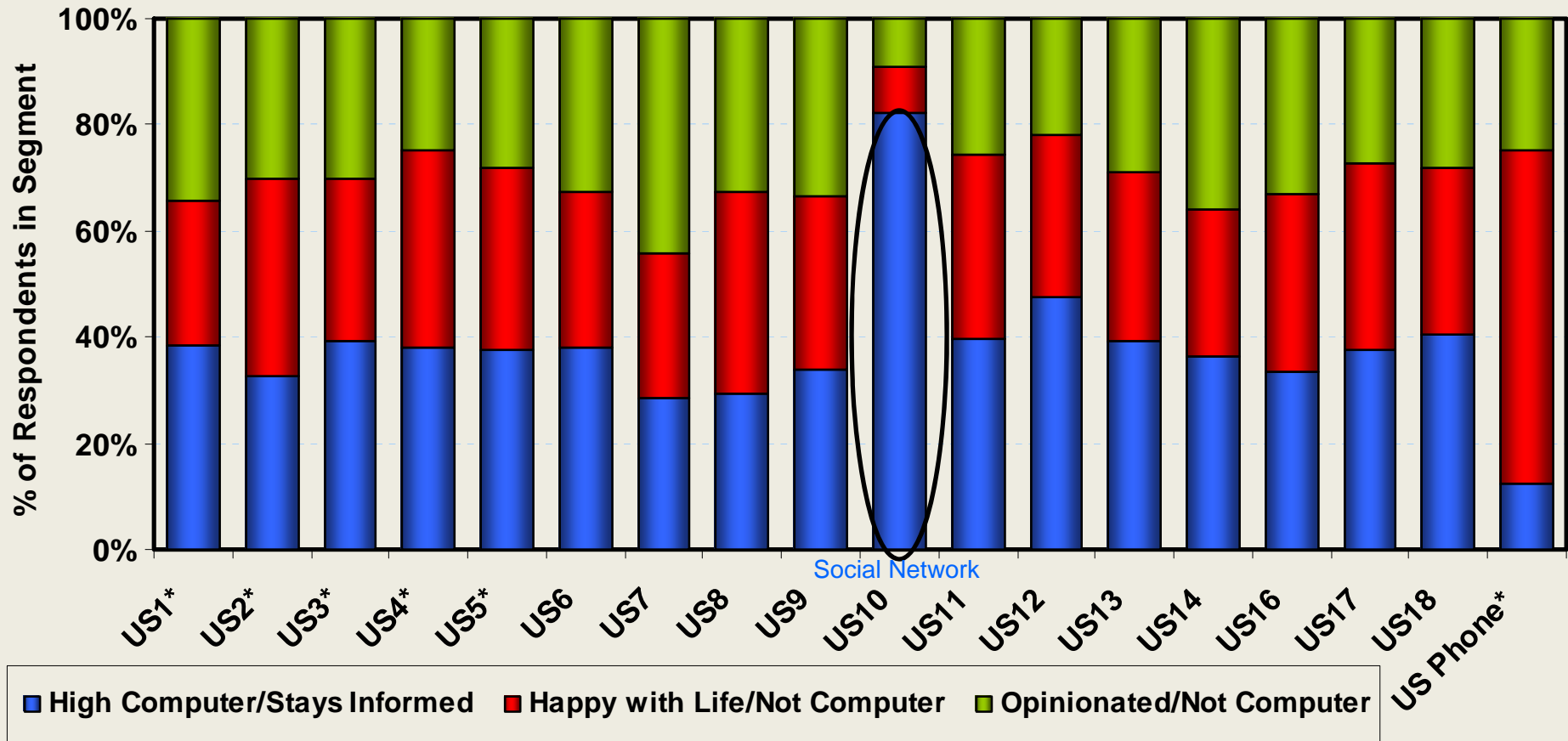
Global variation from grand mean of standardized sociographic segments.



Global Average Sociographic Segmentation Distribution



US Sociographic segment distribution by panel and phone.

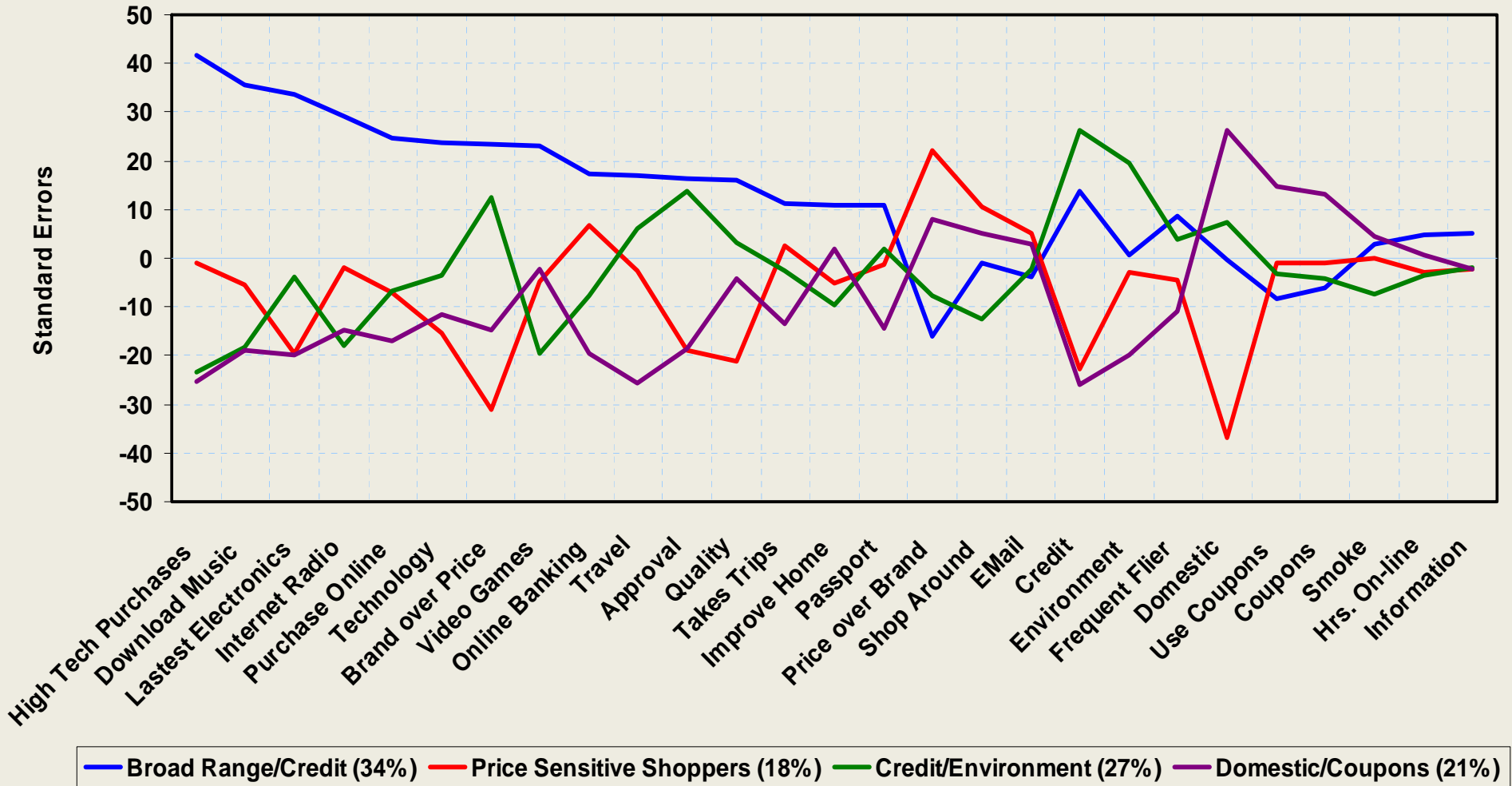


* EM Algorithm for Missing Data & Logit Model for Segmentation

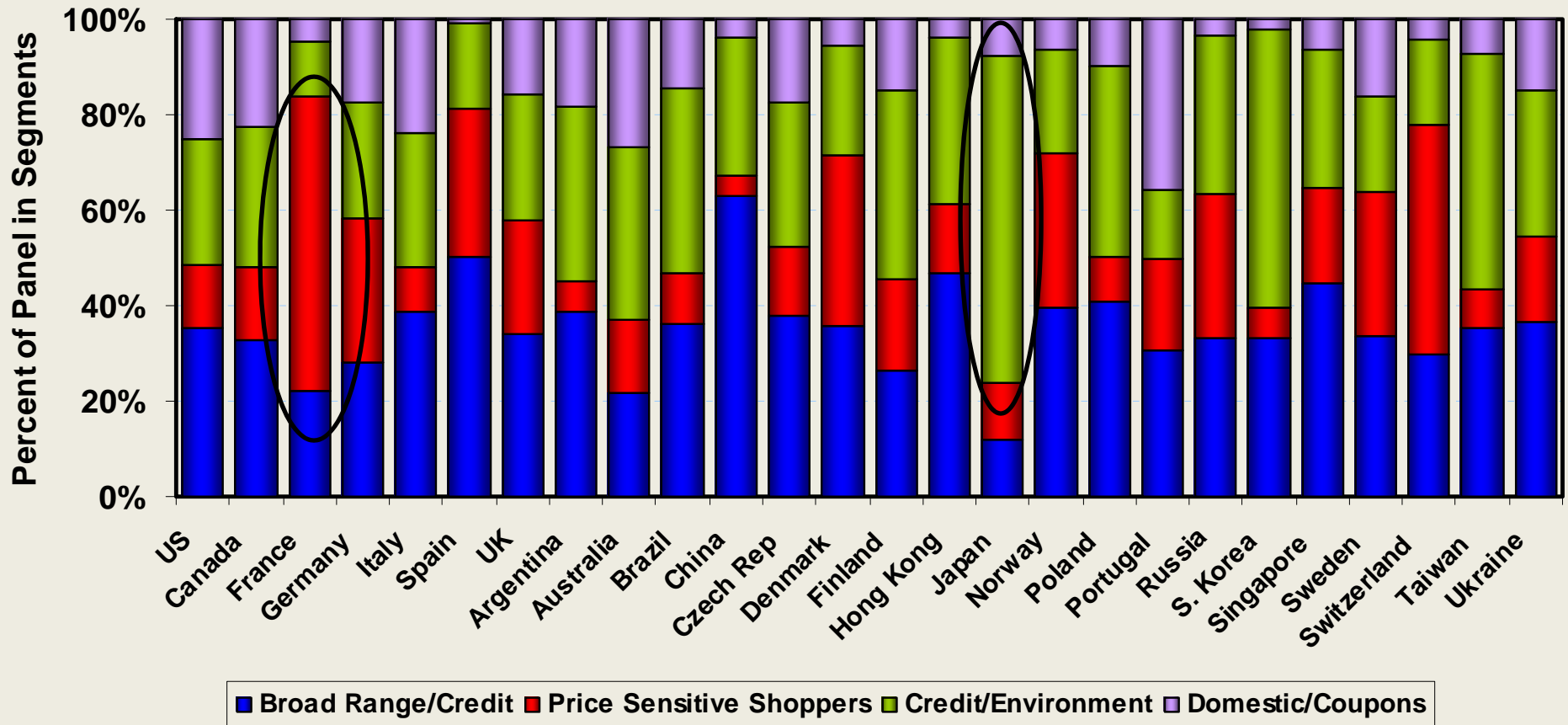
Variation in Buyer Behavior

- **Measuring buyer behavior is the objective of most marketing research. And therefore, consistency of those measurement are critical.**
- **Variables**
 - **Number of High Tech Items Purchased.**
 - **Internet Purchase behavior**
 - **Purchasing Opinions**
- **Measures:**
 - **Clusters (Segments)**
 - **Driving Variables**

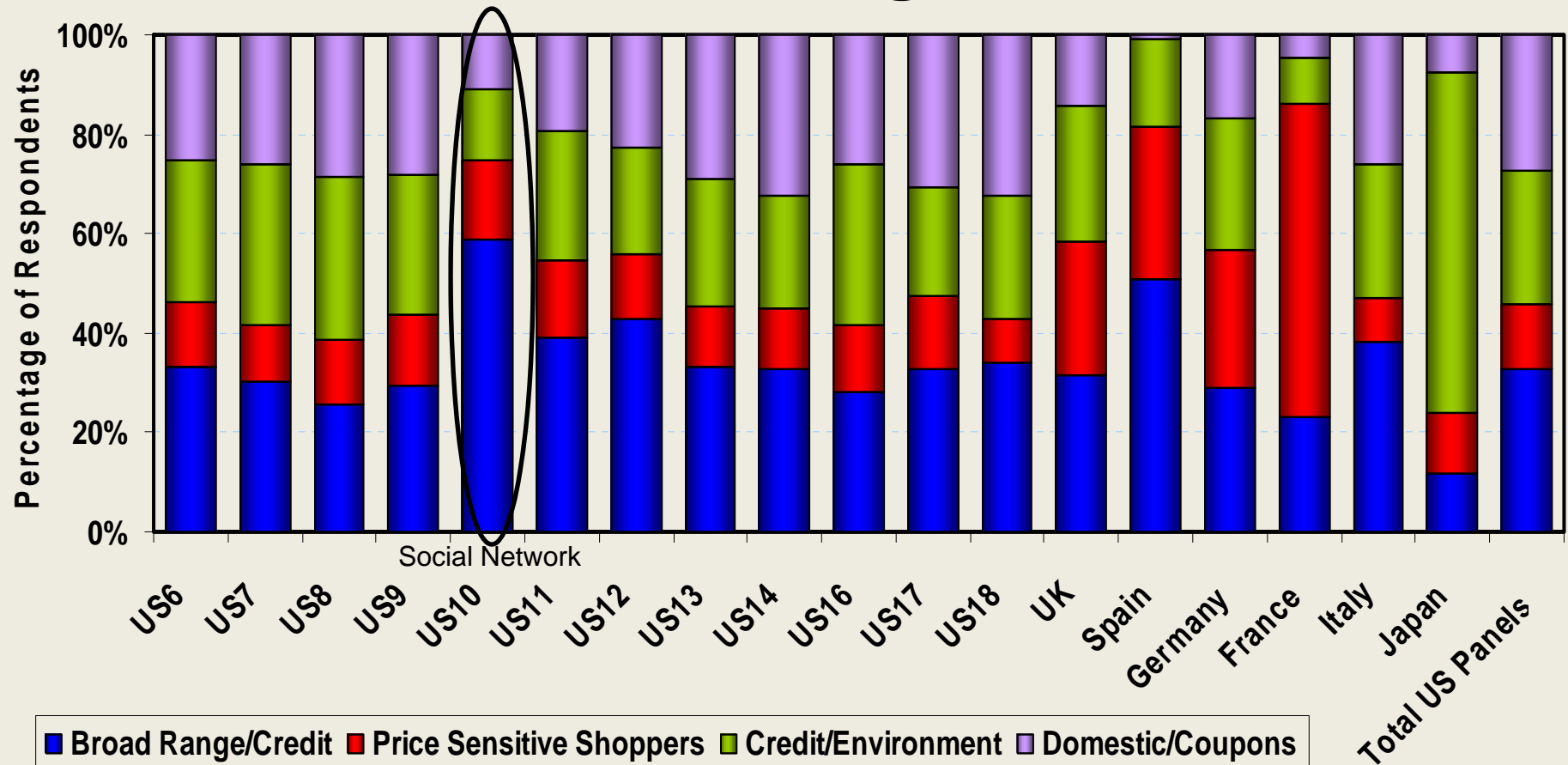
Buyer Behavior Segment Profiles



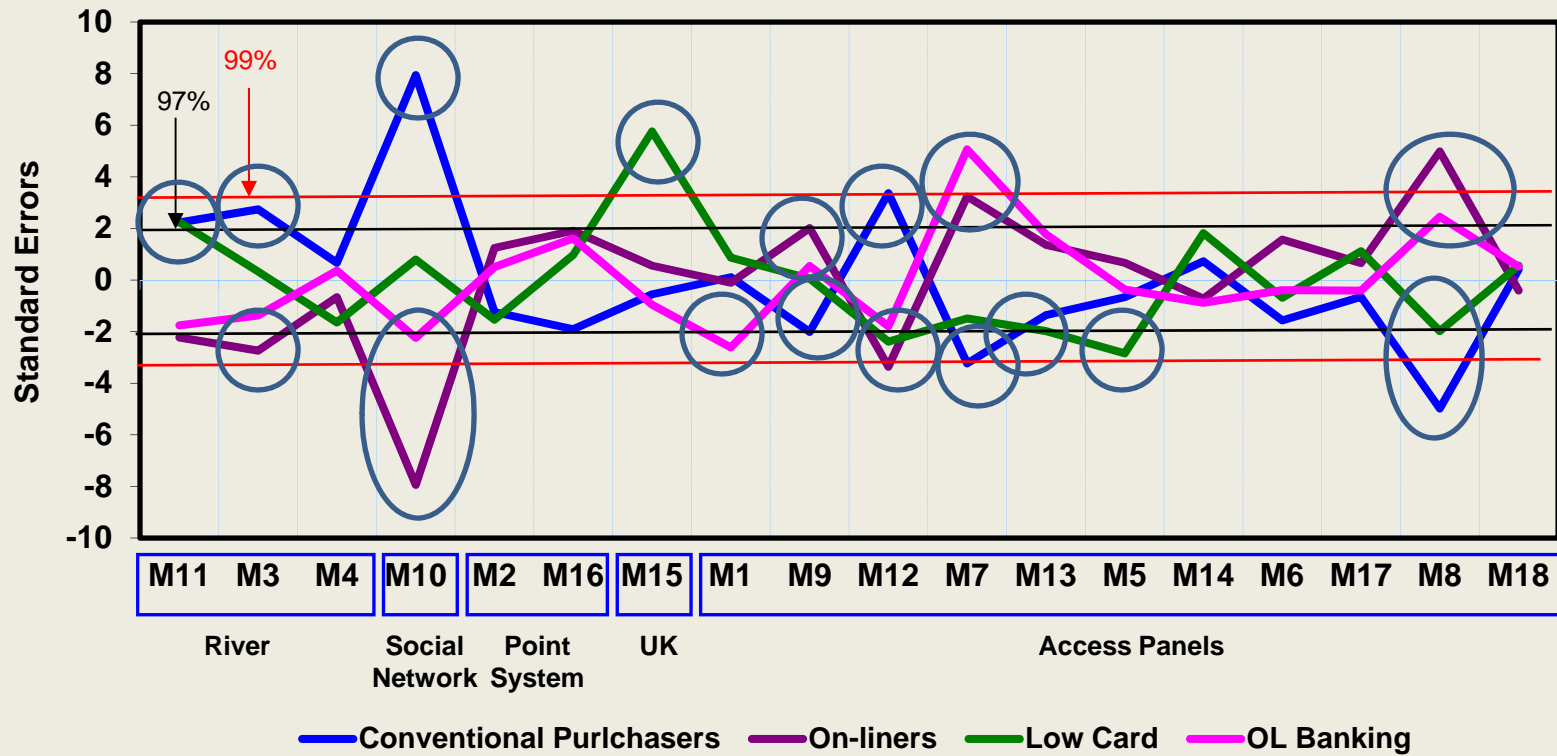
Distribution of Buyer Behavior Segments by Countries.



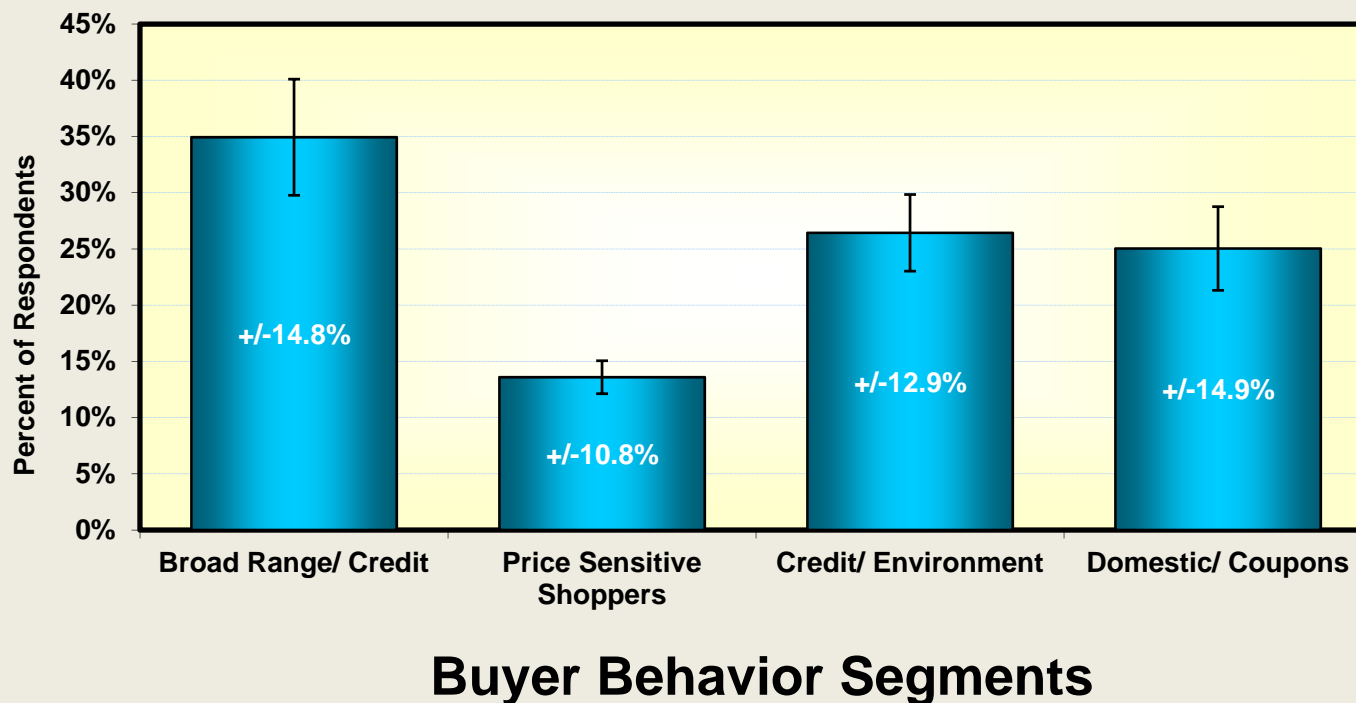
US and Global Distribution of Buyer Behavior among Panels



Statistical Panel Profiles Against Buyer Segments

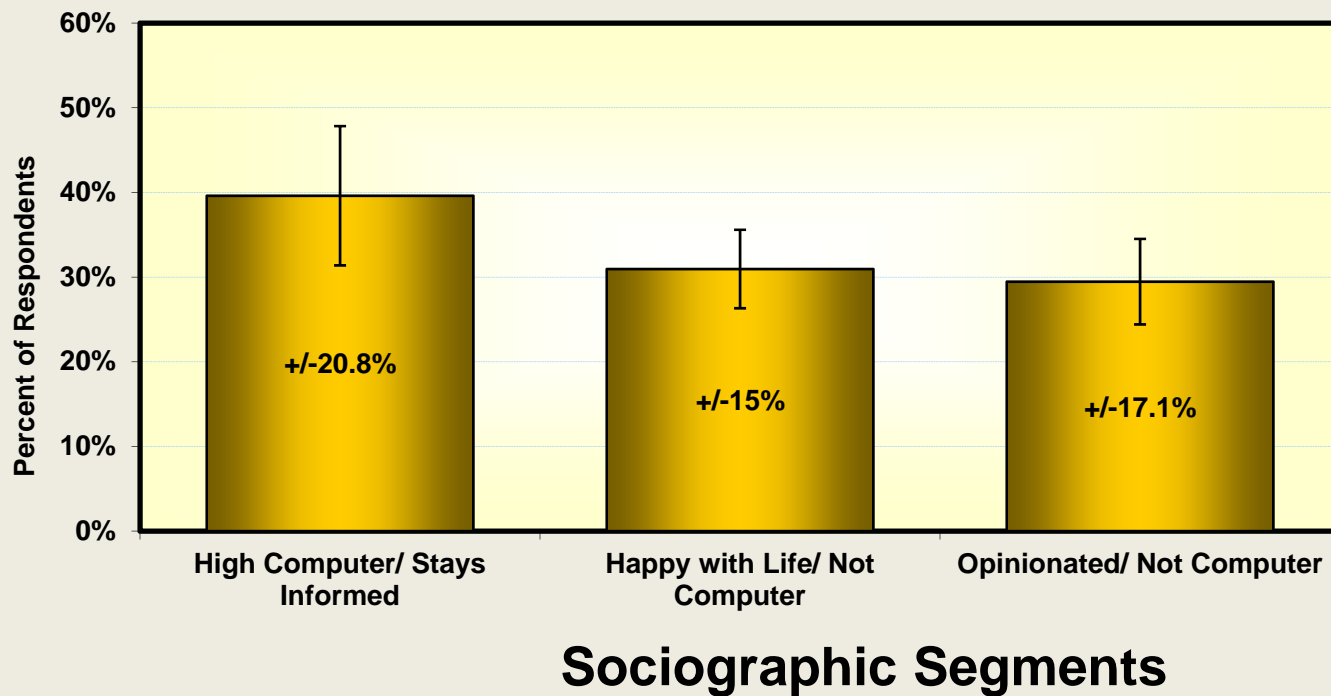


Expected Range of Values for a Random 3 Panel Sample Showing 1.281 Standard Errors (20% of being beyond this range) in the U.S.



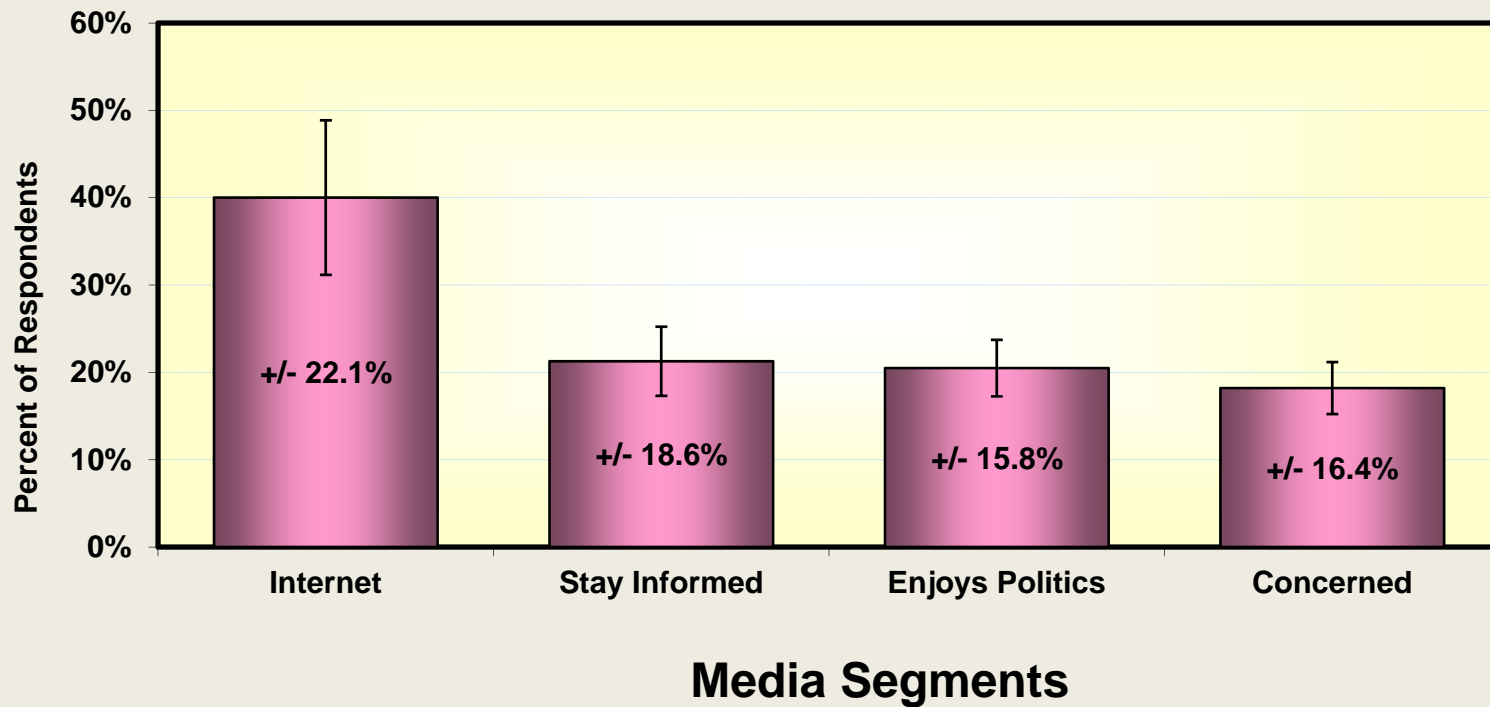
+/- Coefficient of variation

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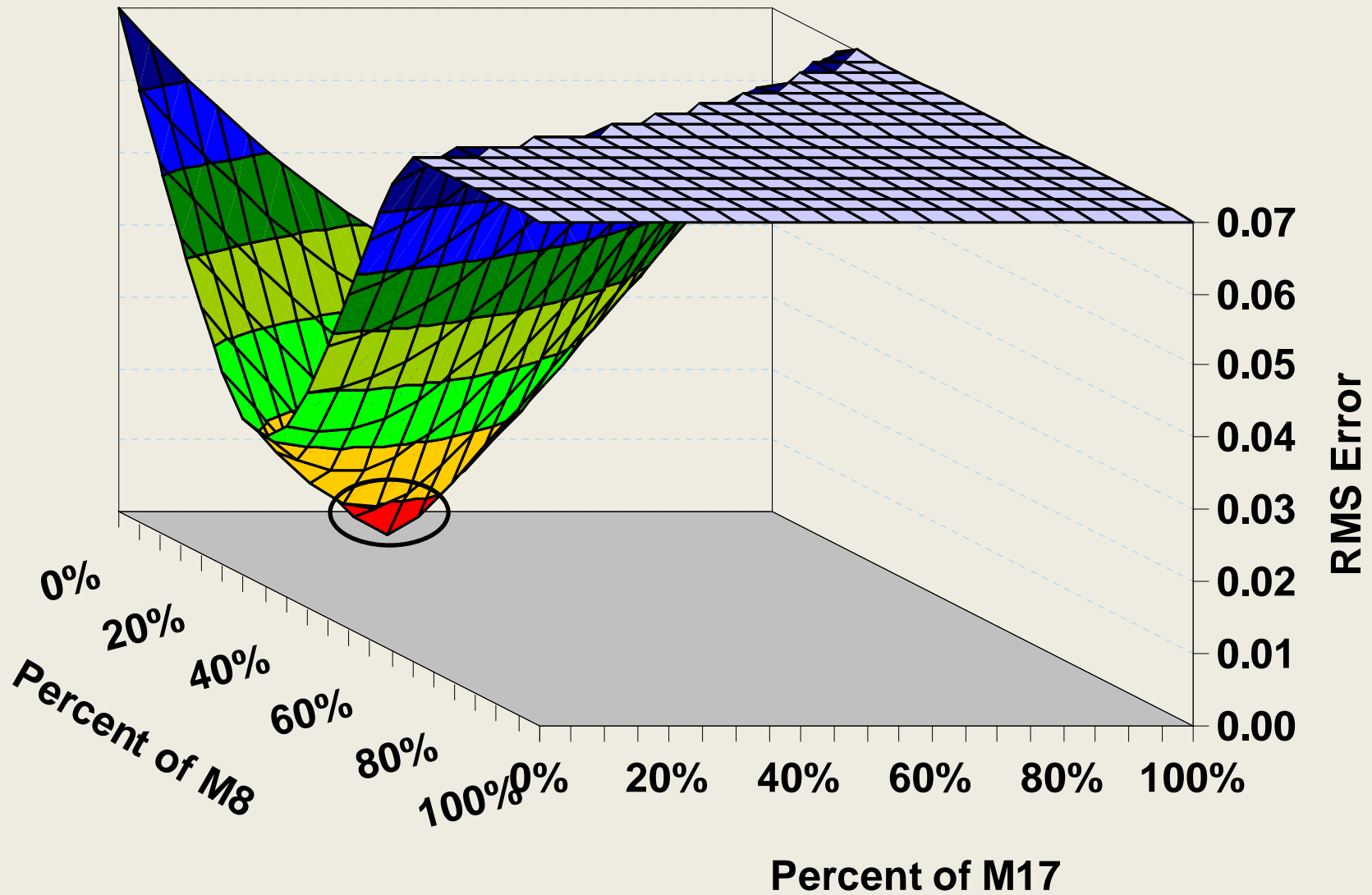
+/- Coefficient of Variation

Expected Range of Values for a Random 3 Panel Sample Showing 1.281 Standard Errors (20% of being beyond this range) in the U.S.



+/- Coefficient of Variation

Optimization Profile



Optimizations

Panels	Optimum	Average	Expected (1 SE)	Inherent (1 SE)
M8	24%	33%		
M17	26%	33%		
M12	50%	34%		
Root Mean Square Error	0.40%	2.36%	8.31%	2.45%

Panels	Optimum	Average	Expected (1 SE)	Inherent (1 SE)
M8	0%	33%		
M13	91%	33%		
M16	9%	34%		
Root Mean Square Error	3.6%	7.8%	8.3%	2.4%

Panels	Optimum	Average	Expected (1 SE)	Inherent (1 SE)
M10	8%	33%		
M13	66%	33%		
M16	27%	34%		
Root Mean Square Error	1.6%	12.3%	8.3%	2.4%

Summary

- Panel ageing in the U.S. has led to degradation.
- Professional Respondents and other problem respondent types appear to greatly affect the reliability of panel research results.
- Sample sources around the world are beginning an ageing cycle. There is still time to document and stabilize the situation.
- Reliability and consistency of samples can be improved by combinations of panels (Blending Methodologies).
- *Optimization models improve blending methods, data is needed within each market to create the baselines so that these models can be employed.*

Thank you

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