

# General Mills Data Quality Update

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GENERAL MILLS



*consumer insights*

# Agenda

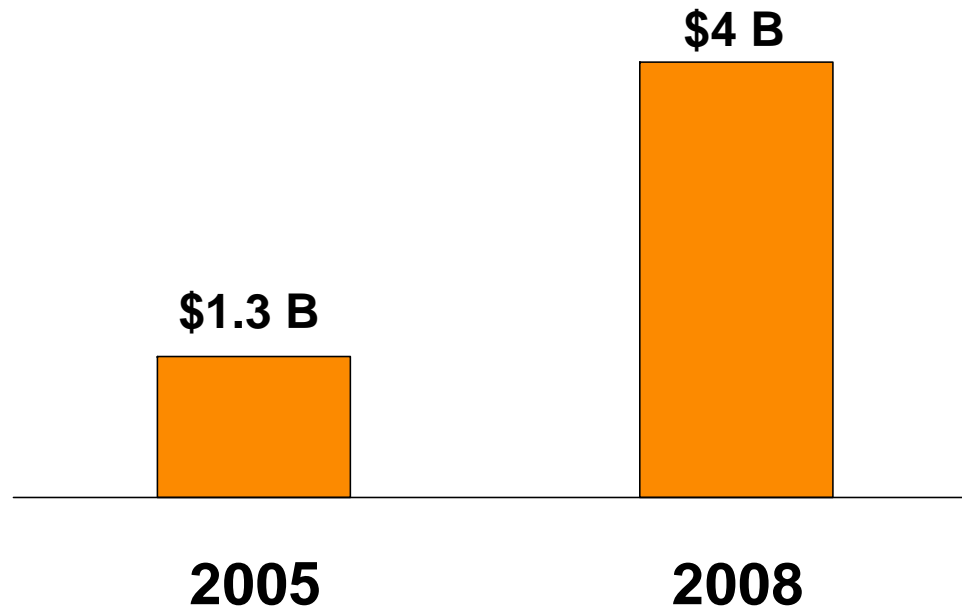
- Background
- Quality Issues General Mills Has Experienced
- Testing Solutions



# Advantages of Online Are Driving Tremendous Growth

- Global spending tripled in only a few years
- By 2010, 25-30% of all survey research budgets worldwide will be allocated to online research

**Global Online Research Spending (est.)**



# MR Industry Concerns about Online Data Quality Arise



**Kim Dedeker**  
*Client Summit Producers*  
September, 2006

**P&G speaks out about online data quality issues at the Client Summit sparking industry-wide discourse**



**Leo Burnett**  
*Online Research Under Fire Newsletter*  
August, 2007

**“Amidst all of the talk about the declining effectiveness of advertising, and the corresponding rise in advertising avoidance, another point is starting to be more discussed: market research has the same problem.”**



**Business Week**  
*Online Polls: How Good Are They?*  
June, 2008

**“Business loves the lower cost and candid answers. But Web surveys have inherent problems.”**

# Quality Issues GMI Has Experienced

1. Respondents Misrepresenting Their Identity
2. Duplicate Respondents
3. Inattentive And Fraudulent Survey Taking Behavior
4. Panelist Experience/Tenure Impacting Concept Scores
5. Lack Of Vendor Transparency Regarding Respondent Source



# Quality Issues GMI Has Experienced

## Respondents Misrepresenting Identity

- “Anonymous” nature of Internet makes it easy to misrepresent one’s identity
- Incentive-based nature of panel research can promote fraud
- Example: Using IP address to check geographic location, a small percentage of respondents in domestic studies can be found to be taking the survey from a location *outside* the US



# Quality Issues GMI Has Experienced

## Duplicate Respondents From A Single Panel

- Rogue panelist: “D. Williams”
- Appeared multiple times within and across studies
- Established multiple email addresses
- Tricked automated checks by appending garbage text to the end of home address
- Gamed the system for products and incentives



# Quality Issues GMI Has Experienced

## Duplicate Respondents Across Panels



- Cross-panel duplication limits the ability to use > 1 panel to complete very large or low incidence studies
- Example: Low-incidence product tests requiring more than one panel to complete regularly result in a small percentage of duplicate respondents (based on mailing address)
- Especially problematic in countries with relatively small populations and panels but high research demand (e.g. UK, Canada)

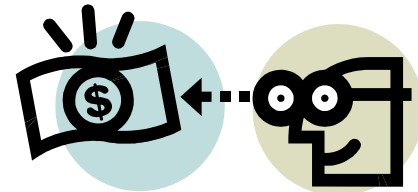


# Quality Issues GMI Has Experienced

## Inattentive And Fraudulent Survey Taking Behavior

- **Fraudulent Behavior**

Falsely qualifying, speeding, or pattern responding. Motivated by incentives



- **Respondent Fatigue**

“Satisficing” (inattentive) behavior induced by an overly long, complex or repetitive questionnaire



- Have removed up to 15% of respondents from studies due to suspect behavior -- speeding, pattern responding, or giving conflicting answers



# Quality Issues GMI Has Experienced

## Panelist Experience/Tenure Impacts Concept Scores

Inexperienced Panelists  
More Favorable On All Measures

	Intent-to-Buy	Awareness	Liking
<b>Inexperienced</b> (1-3 surveys)	43%	64%	78%
<b>Experienced</b> (4-19 surveys)	38%	55%	73%
<b>Very Experienced</b> (20+ surveys)	33%	50%	66%



SCORES



# Testing Solutions

Question: Can we expect similar results from different online panels when these issues have been addressed?

1. Verify panelists are who they say they are
2. Ensure no duplicate respondents exist in a sample, even when using more than one panel
3. Remove fraudulent and inattentive respondents from the data



# Example: Market Landscape Concept Test

- Monadic concept test, involving the creation of a perceptual map to describe consumers' view of a product space (e.g. “breakfast,” “dessert”)
  - Maps identify brands' competitive landscape as well as strengths and weaknesses versus competitors
  - Products perceived to be similar by consumers are grouped into “domains” on the map
  - Used to identify and understand opportunity areas, as well as to test new concepts
  - Sample sizes can exceed 100,000, requiring a very large amount of nationally representative panel sample.
  - Can limit the ability of a single panel to support



# What We Are Seeing

## Results Are Promising:

1. Can Identify Respondents Misrepresenting Their Identity, Duplicates and Bad Survey Taking Behavior
2. Can Measure The Incidence Of These Groups
3. Can Get Similar Metrics – Even Across Different Panels

