

**Optimizing rotations...** ( pgs. 3 & 4 )

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**Generating Optimal  
Sample Presentation Orders**

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**TECHNICAL REPORTS:****2021**

- 24(1) Generating Optimal Sample Presentation Orders

**2020**

- 23(4) Unfolding Financial Markets  
 23(3) Can Larger Sample Sizes Result in Missed Opportunities?  
 23(2) Unfolding Conjoint Utilities  
 23(1) Predicting New Segment Opportunities

**2019**

- 22(3) Text Analysis of Open-Ends  
 22(2) Action Standards for Machines and Humans in Quality Assurance  
 22(1) Making Count-Based Claims from Sample Data

**2018**

- 21(4) Characterizing Sensory Segmentation using Machine Learning  
 21(3) Derived Preference from Applicability Scoring

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The Institute for Perception, founded in 1992, is a full-service research consulting firm offering comprehensive client services to assist in the development process of new and improved products and marketing concepts.

**President's Message**

We are “zooming” into the new year by offering two live streamed courses this spring. (*Details about both courses can be found on pages 5 - 9 of this newsletter.*)

Our **March 23 - 26** course will focus on the scientific principles and new developments in **Measuring Sensory Differences**. You will see how the Thurstonian modeling framework and a consumer relevant action standard offers a more reliable and satisfying approach to establishing a sensory “match.”

Then on **April 20 - 23** our 10th annual **Advertising Claims Support** course will be presented via Zoom. We will teach this course using actual NAD and litigated cases to examine the principles involved in testing product performance and surveys to assess advertising messages. This knowledge base is necessary to provide solid evidentiary support needed in the event of a claims dispute. We have invited 11 brilliant speakers with decades of combined legal experience to help present these cases and engage discussion.

Our technical report in this newsletter addresses the important issue of experimental biases related to sample presentation order. In the report, you will be introduced to the **CR&S method** which provides a solution of superior quality over simple row randomization and replicated Williams Squares.

We hope to see you “virtually” this spring and wish you good health and prosperity in the new year!

Best regards,  
 Daniel M. Ennis  
 President, The Institute for Perception

**WHAT WE DO:**

- **Client Services:** Provide full-service product and concept testing for product development, market research, and claims support
- **Education:** Conduct internal training, external courses, and online webinars on product testing, advanced analytics, and advertising claims support
- **IFPrograms®:** License proprietary software to provide access to new modeling tools
- **Research:** Conduct and publish basic research on human perception in the areas of methodology, measurement, modeling, and prediction

**WEBINAR CALENDAR:**

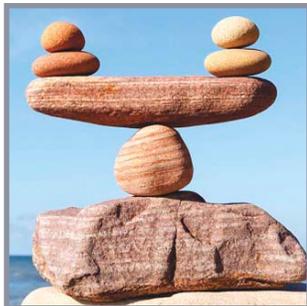
- MARCH 18, 2021** ..... Thursday at 2:00 PM EDT, 75 minutes  
 ■ **Developments in Discrimination Testing for Sensory Equivalence**

**EVENT CALENDAR:**

- March 23 - 26, 2021** ..... Virtual course via **Zoom**  
 ■ **The Science of Measuring Sensory Differences: Principles and New Developments**
- April 20 - 23, 2021** ..... Virtual course via **Zoom**  
 ■ **Advertising Claims Support: Case Histories and Principles**

Detailed information and registration for all courses and webinars are available at [www.ifpress.com](http://www.ifpress.com)

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 7629 Hull Street Road • Richmond, VA 23235

**WEBINAR: March 18th at 2:00 EDT****Developments in Discrimination Testing for Sensory Equivalence***Taught by: Dr. Benoît Rousseau*

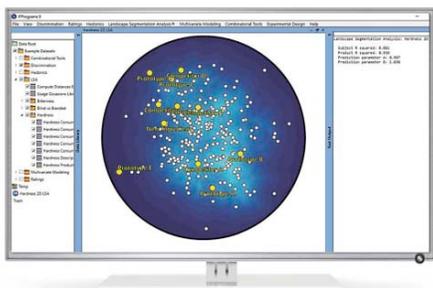
When using discrimination methodologies, sensory and consumer research scientists in CPG companies focus predominantly on the issue of sensory equivalence. They want supporting evidence that a change to an existing brand will not be rejected by consumers. While the issue is equivalence, the typical approach is to run a statistical test against the Null Hypothesis of no difference. This is done even though two samples will never be identical and thus a conclusion of difference will always be reached provided that the test power is high enough.

In this webinar, we will describe the basic principles behind testing for sensory equivalence and illustrate how using the Null Hypothesis of no difference will result in missed opportunities for product changes when an experiment's sample size is increased.

Equivalence testing requires setting a consumer-relevant action standard against which future product changes will be compared. We will review three standard indices for an action standard: Proportion of tests correct, proportion discriminators in the population, and Thurstonian delta. This webinar will show you how the Thurstonian approach is the only one providing consistent scaling across methodologies, an essential feature for reliable decision-making since discrimination paradigms differ in power (e.g., tetrads vs. triangle and duo-trio methods). It also permits the creation of a trained panel/consumer sensitivity link to ensure that the action standard is consumer relevant.

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**Sensory Difference Tests**

Replicated Preference Testing to Diagnose Consumer Segmentation

Introduction to Thurstonian Modeling – 1 & 2

Advances in Tetrad Testing

Precision of Measurement in Sensory Difference Testing

How to Calculate Consumer Relevant Risk using Sensory Difference Tests

Preference without a Significant Sensory Difference? A Solution

Developing Consumer Relevant Action Standards for Sensory Difference Testing

Discrimination Testing with Batch-to-Batch Variability

Derived Preference and Difference from Applicability Scoring

Predicting Future Product Success: Capitalizing on Historical Consumer Data

**Advertising Claims Support**

Supporting Numerical Superiority Claims

Claiming Equivalence, Unsurpassed, and Superiority Simultaneously

Issues in Supporting "Up-to" Claims

Supporting Count-Based Sensory Advertising Claims

**Drivers of Liking® and Landscape Segmentation Analysis®**

Mapping Techniques to Link Consumer and Expert Data

Understanding the Consumer: Preference Mapping vs. LSA

Maximizing Consumer Insights by Contrasting Blind and Branded Test Findings

Predicting Future Product Success: Capitalizing on Historical Consumer Data

**Combinatorial Tools**

Hiding in Plain Sight: Finding New Opportunities using Graph Theory

Introduction to Graph Theoretic Tools

eTURF 2.0: A Cutting Edge TURF Solution for Datasets of All Sizes

Large TURF Problems: Finding Custom Solutions

**Design Issues in Product Tests and Surveys**

The Science of Answering Questions

Developments in Applicability & CATA Scoring

Removing Experimental Biases in Sensory and Consumer Research Data

**Innovation**

Invention and Innovation

**Machine Learning**

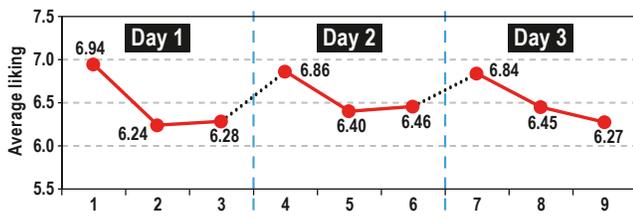
A Three-Step Approach to Characterizing Consumer Segmentation via Machine Learning

Action Standards for Machines and Humans in Quality Assurance

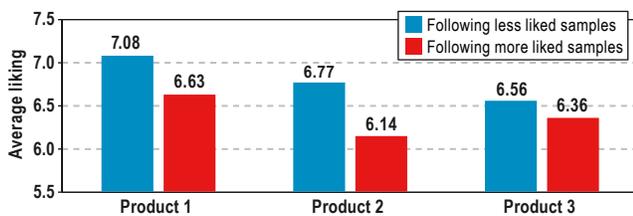
Text Analysis of Open-Ends

Synergistic Analytics: Turbo-Charging Consumer Analytics – 1 & 2

**Background:** Sample presentation orders arise in sensory and consumer research because sequential monadic evaluations of multiple samples are often used. Due to the successive nature of the evaluations, it is necessary to address experimental biases related to the sample presentation orders. Failing to do so will lead to biased and more variable estimates leading to reduced sample discriminability. Figure 1 illustrates typical position and sequence effects on 9-point hedonic scale averages (based on actual client-related consumer work involving the evaluation of nine samples over three days.)



**Figure 1a.** Position effects: Average liking scores over all 9 products by position.



**Figure 1b.** Sequence effects: Average liking ratings for 3 products based on the hedonic value of the preceding samples.

In a previous technical report<sup>1</sup>, we describe how various approaches differ in their ability to control for sample position, sample sequences and their spread across the design. Randomization by row (respondent) will never provide a balanced design since this would require an infinite number of respondents. A replicated Williams Square design<sup>2</sup> will provide partial balancing, with a balance of sample position and sequences (under certain conditions), but there will be no control over where these sequences occur in the design (sequence spread). We showed that an approach using column randomization and search across millions of options delivers the most balanced design based on these three indices. The *column randomization and search method* (CR&S) is available in the Tools version of the *IFPrograms*<sup>®</sup> software<sup>3</sup>.

We will focus on a situation that often occurs where testing is conducted over multiple days. In this situation, sequence effects within a day are important but sequence effects are not expected to occur from the last sample on one day to the first sample on the next day. Taking this into account would allow more attention to be paid to sequences that matter and deprioritize those that do not.

**Scenario:** In a previous project<sup>1</sup>, you investigated an optimal products presentation design for six samples evaluated by 300 consumers. You confirmed that the one-day design, based on the CR&S method, provided more balanced rotations than a replicated Williams Square design.

In your new project, you require 240 respondents to consume larger amounts of a new set of four orange juice samples (9 oz), so that two days of testing are needed for each consumer to evaluate all four samples. You decide to compare again the efficiency of the replicated Williams Square and CR&S approaches and determine whether they result in markedly different solutions. One aspect of particular importance is the consideration that not all sequences play a prominent role in a multi-day experiment.

**Between-Day Sequences:** In a sequential monadic design, the nature of the samples tested can require evaluations over several days or even weeks (or months). This is often the case when investigating consumer opinions of cosmetics or personal care products, such as body wash samples. If a single sample is evaluated within a time unit (e.g., 3 days), rotations generated with a replicated Williams Square will balance for positions and sequences (but not for the sequence spread as mentioned earlier). When research involves a sequential monadic evaluation of samples with different sets evaluated during each time period (e.g., each day in a multi-day project), there is a need to account for the differential role played by all sequences across the design. For instance, in Figure 1a the intra-day sequences 1 → 2 and 2 → 3 play a much larger role than the between-day sequence 3 → 4. We can reasonably ignore the relative effect of the 3 → 4 and 6 → 7 sequences compared to the intra-day sequences. Presentation orders aiming at controlling sequence effects should treat these two sequence types differently.

**Design with Equal Treatment of Sequences:** In Table 1, a basic Williams Square design (left sub-table) controls product positions and sequences. The right sub-table summarizes where each of the 12 sequences appear in the design. You also use the Table 1 design as an initial starting point for The CR&S<sup>3</sup> column randomization method. Notice that

Rotation	Product Position					Sequence Position		
	1	2	3	4		1	2	3
1	A	B	D	C	→	AB	BD	DC
2	B	C	A	D	→	BC	CA	AD
3	C	D	B	A	→	CD	DB	BA
4	D	A	C	B	→	DA	AC	CB

**Table 1.** Product and sequence positions in a basic Williams Square design for four products.

the sequence positions of BD, CA, DB, and AC fall so that the first of each pair appears as the second sample on the first day, and the second of each pair as the first sample of the second day. Figure 2 summarizes the counts you find for individual sample positions, sequences, and individual sequence positions (sequence spread). These designs assume that all three sample sequences (1 → 2, 2 → 3, 3 → 4) are equally important ('influential').

Figure 2 illustrates that both the replicated Williams Square and CR&S approaches achieve the same product position counts and influential sequence counts. However, as occurred in your previous project<sup>1</sup>, the spread across the three possible sequence positions is much worse for the

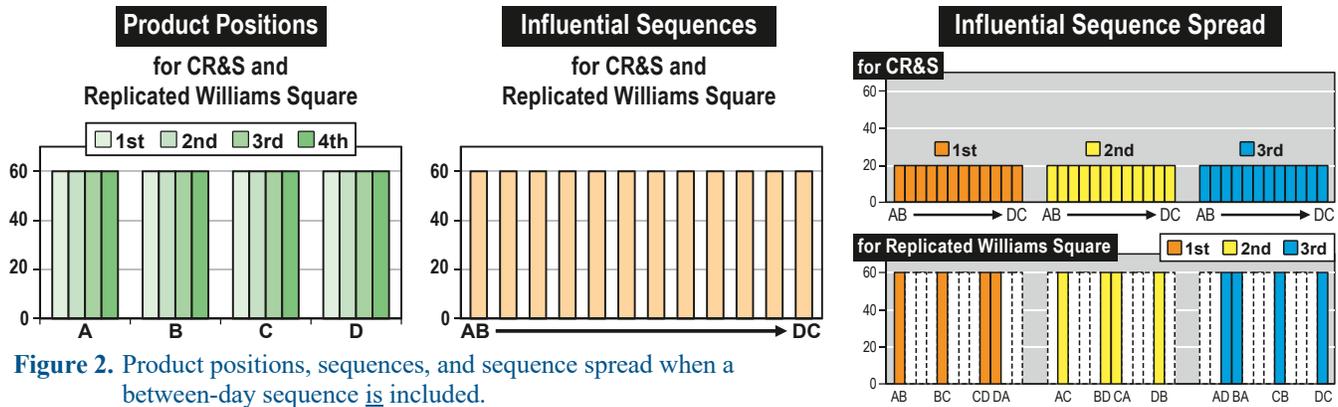


Figure 2. Product positions, sequences, and sequence spread when a between-day sequence is included.

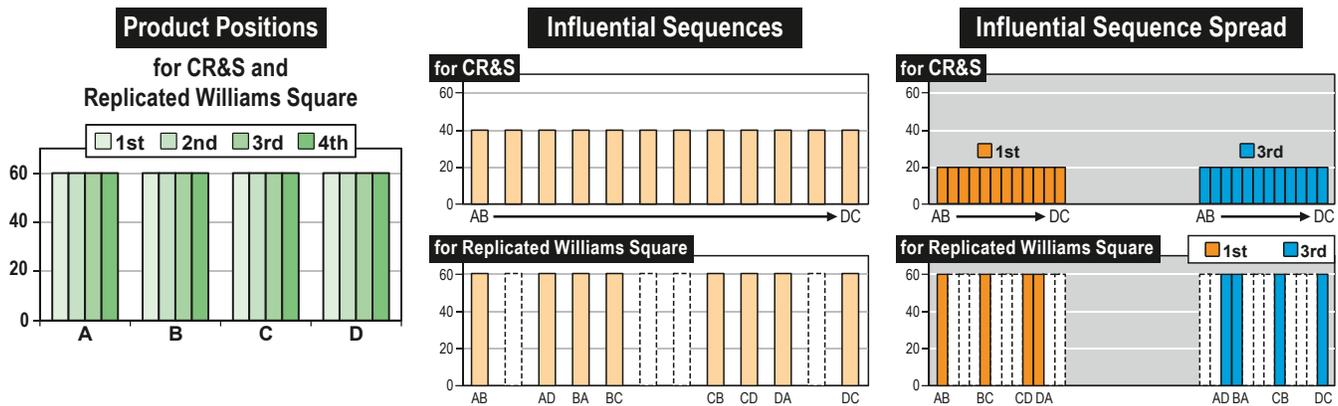


Figure 3. Product positions, sequences, and sequence spread when a between-day sequence is not included.

replicated Williams Square where only 0 or 60 counts occur. For example, sequence AB never occurs in the 2nd or 3rd position. In the CR&S approach there are 20 counts for all sequences in all positions. The CR&S method again appears to be a better option. However, you still have not accounted for the relative importance of sequences within days compared to between days. Since your test will take place over two days, you investigate the between-day sequence effect to see how the two methods will take it into account.

**Designs with Sequences of Differential Influence:** The Williams Square approach does not account for sequences of differential influence. This makes the design less efficient than it could be. In order to evaluate the designs generated by either method, you ignore the between-day sequences. The CR&S method has the advantage because it can find designs where influential sequences are allocated equally among the possible sequences. This does not occur with Williams Squares where some sequences have no influence at all. To determine the design, you specify that the evaluation will take place over two days, with two samples per day when using the method. Figure 3 demonstrates the disparities between the two approaches. While both methods achieve suitable sample position balance, clear differences are apparent for the individual sequence counts and the sequence spread. For instance, because the AC, BD, CA and DB sequences would exist only between the second sample of Day 1 and the first sample of Day 2 in the replicated Williams Squares (Table 1), they are not influential. The lack of sequence balance for the replicated Williams Squares is even clearer when considering the sequence spread. In contrast, the CR&S approach delivers

a superior design, where sample positions, sequences and sequence positions are perfectly balanced across the design.

Following these comparisons, you decide to proceed with the CR&S design for your upcoming consumer test, confident that you will achieve greater control over potential biases that might arise from the sample presentation order than you would have achieved with Williams Squares.

**Conclusion:** The sample presentation design can lack balancing even when replicated Williams Squares are used. The influence on collected data of each of the effects considered (sample positions, sequences, and sequence spread) will vary depending on the nature of the samples, similarity of samples, and the delay between successive sample evaluations. Since a researcher generally will not know beforehand the degree of the design-related biases, we strongly recommend using an approach that will minimize them under any circumstances. Even though the CR&S method might not always be able to balance a design perfectly, such as when there is an insufficient number of test participants, it will provide a solution of superior quality over simple row randomization and replicated Williams Squares.

**References**

1. Ennis, D. M., Rousseau, B, and Ennis, J. M. (2014). Rotations in product tests and surveys. *IFPress*, 17(1) 3-4.
2. Williams, E. J. (1949). Experimental designs balanced for the estimation of residual effects of treatments. *Australian Journal of Scientific Research*, Ser. A 2, 149-168.
3. *IFPrograms*® software, Tools version, The Institute for Perception, Richmond, VA.

# The Science of Measuring Sensory Differences

Principles and New Developments

Taught by Dr. Daniel Ennis, Dr. Benoît Rousseau, and William J. Russ

March 23 - 26, 2021



The standard approach to investigating whether sensory differences exist or not is to use appropriately powered discrimination tests and rely on the  $p$ -value from a null hypothesis of no-difference. While this might be a suitable approach when trying to demonstrate that a sensory difference exists, it lacks a philosophical and statistical foundation when research needs to establish a sensory "match." In this course, we will depart from this tradition and describe a more reliable approach supported by decades of research using the Thurstonian modeling framework and a consumer relevant action standard.

Using a scenario that begins with a proposed formulation change, we follow the project's path starting with the application of Thurstonian theory to resolve conflicting difference test results. We then describe a typical power approach to a risk-management program involving the tetrad method, optimal panel sample sizes, and a consumer-relevant internal action standard. The internal action standard is based on consumer research. We proceed by outlining limitations of the traditional approach to study equivalence and describe a more reliable direct test using the same action standard. The takeaway from the course is that participants will be able to generate superior recommendations for optimal panel sample sizes based on a company's preferred risk profile. Attendees will participate actively in the journey outlined in this course through a series of exercises and the use of the *IFPrograms*<sup>®</sup> software.

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This course has been developed for technical and supervisory personnel involved in all aspects of sensory and consumer research.

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THIS COURSE WILL  
BE PRESENTED VIA **zoom**

Due to Covid-19 travel restrictions, this course will be presented using the Zoom video meeting platform. You will be sent a link by email to join the meeting with the speakers and other attendees. All supporting materials will be mailed to you before the event, so please register early to allow for sufficient shipping time.

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*IFPrograms*<sup>®</sup> software will be used to perform analyses demonstrated in the course. Prior to the course, you will be able to download the Professional version used for LSA and other sensory and consumer data-related analyses.

*(IFPrograms is not required to apply course principles.)*

## Registration

### The Science of Measuring Sensory Differences (March 23 - 26) .....\$1,175\*

\*A 10% discount will be applied to each additional registration when registered at the same time, from the same company.

**Register Online:** [www.ifpress.com/march-2021-program](http://www.ifpress.com/march-2021-program)

Fee includes a printed manual of the slides, *IFPrograms*<sup>®</sup> exercise booklet, and a copy of our books: *Tools and Applications of Sensory and Consumer Science*, *Readings in Advertising Claims Substantiation*, and *Thurstonian Models: Categorical Decision Making in the Presence of Noise*



You will also receive a three-month free trial of the Professional version of *IFPrograms*<sup>®</sup> software which will be used during the course.

Fee payment can be made online by credit card. If you qualify for a fee discount, or would like information about payment by invoice, please contact Susan Longest before registering at [mail@ifpress.com](mailto:mail@ifpress.com) or call 804-675-2980.

**Cancellation Policy:** Registrants who have not cancelled two working days prior to the course will be charged the entire fee. Substitutions are allowed for any reason.

## TUESDAY

March 23, 9am - 3pm ET

### ► Introduction

- Methodological and analytical review of sensory measurements
- Overview of sensory discrimination testing
- Background to workshop's illustrative scenarios

### ► **Project 1: Flavor improvement of a chocolate-based snack**

- Introduction of the 2-AFC and 3-AFC methodologies – *IFPrograms exercises*
- Standard statistical approach: Binomial test and 95% confidence level

### ► **Project 2: Ingredient change of a baked good product – Product "match"**

- Introduction of the duo-trio and triangle methodologies
- Illustrating finding inconsistencies and low confidence in experiment conclusions – *IFPrograms exercises*

### ► **Proportion of discriminators in the population:** Background and why it is misleading

### ► **Introduction of a theoretical structure for sensory measurements**

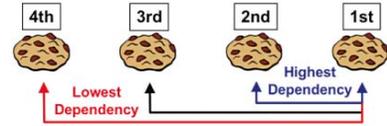
- Illustrative examples based on peer-reviewed research
- Expanding a purely statistical state-of-mind by incorporating decision processes – *IFPrograms exercises*
- Thurstonian Theory: Introduction of a standardized measure of sensory difference,  $\delta$ , and of its estimate  $d'$   
*(Wednesday, Thursday, and Friday outline continues on the next page.)*

**WEDNESDAY**

March 24, 9am - 3pm ET

► **Thurstonian structure for sensory measurements**

- Application of basic principles to intensity and hedonic rating scales
- Application to ranking and Check-All-That-Apply (CATA) scoring
- Estimating the size of sensory differences – *IFPrograms exercises*

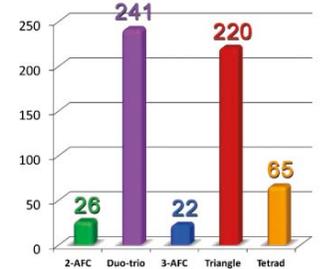


► **Back to [Project 1](#) and [Project 2](#)**

- Data analyses and interpretation; resolution of result inconsistencies – *IFPrograms exercises*

► **Why a difference will always be found: The need to estimate consumer relevance**

- Preference testing to establish importance/relevance
- Introduction of the beta-binomial model to handle test replications
- Application to [Project 1](#) and [Project 2](#) – *IFPrograms exercises*



► **Beyond the traditional triangle and duo-trio tests: The tetrad method**

- Illustration of the reason behind the tetrad method's superior statistical power
- Review of published case studies confirming the tetrad's superiority
- The importance of giving the proper task instructions

► **Case Study: A significant consumer preference despite a lack of statistical sensory difference – *IFPrograms exercises***

**THURSDAY**

March 25, 9am - 3pm ET

► **Next Step: The limitations of focusing solely on statistical significance**

- Illustration of the differences in statistical power of common sensory discrimination methods – *IFPrograms exercises*
- The need to estimate the importance of a sensory difference: Consumer relevance and  $\delta_R$
- Simulations and estimates of optimal sample sizes – *IFPrograms exercises*

► **Establishing the size of a consumer relevant sensory difference: Using the same-different method**

- Overview of the same-different method
- Are two samples the same or different? The tau criterion
- Application to [Project 1](#) and [Project 2](#) – *IFPrograms exercises*
- Research involving linking internal and consumer panel sensory sensitivities – *IFPrograms exercises*
- Building a successful sensory testing program: Type I and Type II errors, methodology, panelists, sample size, consumer relevance ( $\delta_R$ )



► **Establishing the suitability of a switch to the tetrad method**

- Review of experimental variables: Training, retasting, memory
- Beverage research to study the switch from triangle to tetrad – *IFPrograms exercises*

**FRIDAY**

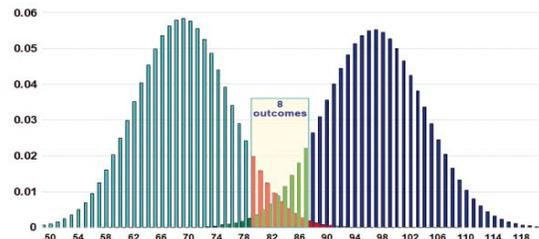
March 26, 9am - Noon ET

► **Latest developments: Difference or equivalence testing**

- Contrasting difference and equivalence testing
- Reframing [Project 1](#) and [Project 2](#) in terms of difference (*Project 1*) and equivalence (*Project 2*) testing
- Potential issues with traditional power concept for equivalence testing: Varying sample sizes – *IFPrograms exercises*
- Why the concept of proportion discriminators is also misleading for equivalence testing

► **Theoretical illustrations of the switching roles of  $\alpha$  (incorrectly rejecting no difference) and  $\beta$  (incorrectly accepting no difference)**

- Graphical representation – *IFPrograms exercises*



► **Practical application of difference and equivalence testing**

- Revisiting the previous power and sample size considerations of [Project 1](#) and [Project 2](#)
- Why experimental parameters must be modified for equivalence testing (*Project 2*)
- Development of a broad sensory discrimination testing program for difference and equivalence testing objectives

► **Review of all covered materials and workshop conclusions**

– *IFPrograms exercises*

# ADVERTISING CLAIMS SUPPORT

## Case Histories and Principles



The purpose of this course is to present principles involved in *testing product performance* and *surveys to assess advertising messages*. This knowledge base is necessary in order to provide solid evidentiary support needed in the event of a claims dispute. Claims support is a critical business focus for many companies in categories with aggressive competitors.

The course speakers have decades of experience as instructors, scientific experts, jurors, and litigators in addressing claims with significant survey and product testing components. National Advertising Division® (NAD®) and litigated cases will be used to examine and reinforce the information discussed.

Due to Covid-19, we will be presenting this year's course entirely via the Zoom meeting platform. This option has allowed us to reduce the course fee substantially compared to previous years.

### The Scientific Team

- Dr. Daniel M. Ennis
- Dr. Benoît Rousseau
- William J. Russ

### The Legal Team

#### NAD

- Kat Dunnigan
- La Toya Sutton
- Eric Unis

#### Litigators/Counsel

- Lauren Aronson
- Alex Kaplan
- Christopher A. Cole
- Cynthia E. Kinser
- David G. Mallen
- Kathryn Farrara
- Risa Drexler
- Kristin Marchesiello

## REGISTRATION

### Advertising Claims Support (April 20-23).... \$1,175\*

\*A 10% discount will be applied to each additional registration when registered at the same time, from the same company.

\*The Institute for Perception offers reduced or waived course fees to non-profit entities, students, judges, government employees, and others. For more information, please contact us.

This program qualifies for Certified Food Scientist contact hours (CH). CFS Certificants may claim 16 CH for their attendance. Continuing Legal Education (CLE) credits will be sought upon request.

**Register Online:** [www.ifpress.com/april-2021-program](http://www.ifpress.com/april-2021-program)

Fee includes a printed manual of the slides presented and a copy of our current books:

- *Tools and Applications of Sensory and Consumer Science*
- *Readings in Advertising Claims Substantiation*
- *Thurstonian Models: Categorical Decision Making in the Presence of Noise*



Fee payment can be made online by credit card. If you qualify for a fee discount, or would like information about payment by invoice, please contact **Susan Longest** before registering at [mail@ifpress.com](mailto:mail@ifpress.com) or call 804-675-2980.

**Cancellation Policy:** Registrants who have not cancelled two working days prior to the course will be charged the entire fee. Substitutions are allowed for any reason.

## TUESDAY (APRIL 20, 9am - 3pm ET)

### 9:00 – 10:00 | Advertising Claims Support

- ◆ Introduction and scope of the course
- ◆ Claims support in product/brand development
- ◆ Admissibility of expert testimony
- ◆ Surveys in false advertising and trademark cases
- ◆ Efficacy, perception, and materiality

### 10:10 – 11:00 | Claims and False Advertising; Internal Counsel Perspective

- ◆ Three ways an ad can be false
- ◆ A typical false advertising lawsuit
- ◆ Puffery, falsity, and injury examples:
  - *The Procter & Gamble Co. vs. Kimberly-Clark* (2008)
  - *Schick vs. The Gillette Co.* (2005)
  - *The Procter & Gamble Co. vs. Ultreo, S.D.N.Y.* (2008)
- ◆ To sue, challenge, or negotiate - an internal counsel's perspective

### 11:10 – Noon | Regulatory and ASTM Sensory Claims Guide

- ◆ Regulatory actions and cases
- ◆ Review of the ASTM Claims Guide
  - Evolution of the Guide content
  - Choosing a target population, product selection, sampling and handling, selection of markets
  - Claims: Superiority, unsurpassed, equivalence, non-comparative

### ■ Noon – 1:00 LUNCH ■

### 1:00 – 3:00 | NAD Mock Hearings; Overview of the NAD

- ◆ **NAD Mock Hearing #1:** MillerCoors - Miller Lite vs Bud Light
- ◆ **NAD Mock Hearing #2:** General Mills - Yoplait vs Chobani
- ◆ Advertising self-regulation and the NAD process
- ◆ Preparing for an NAD hearing

1) **NAD Case #5129** (2009) *MillerCoors, LLC (Miller Lite Beer)*

2) **NAD Case #5715** (2014) *General Mills Inc. (Yoplait Blended Greek Yogurt)*

## WEDNESDAY (APRIL 21, 9am - 3pm ET)

### 9:00 – 10:00 | Test Method, Design, Location, and Participants

- ◆ Test options: Monadic, sequential, direct comparisons
- ◆ Test design issues: Within-subject, matched samples, position and sequential effects, replication
- ◆ Choosing a testing location and test subjects

3) **NAD Case #5425** (2012) *Church & Dwight Co., Inc. (Arm & Hammer® Sensitive Skin Plus Scent)*

4) **NAD Case #5782** (2014) *The MOM brands Company (Malt-O-Meal Cereals)*

5) **NAD Case #6041** (2016) *Unilever United States, Inc. (Suave Essentials Body Wash)*

### 10:10 – 11:00 | Sensory and Hedonic Methods

- ◆ Methods: Difference, descriptive, hedonic
- ◆ Data: Counts, ranking, rating scales
- ◆ “Better” and “Greater”, hedonic, sensory, and technical claims
- ◆ Attribute interdependencies

6) **NAD Case #5866** (2015) *Kimberly-Clark Corp. (Huggies Natural Care Wipes)*

7) **NAD Case #5874** (2015) and **NARB Panel #207** (2016) *Chattam, Inc. (Nasacort)*

8) **NAD Case #5984** (2016) *French's Food Company (French's Tomato Ketchup)*

► **WEDNESDAY** - outline continues on next page...

► **WEDNESDAY** *continued...*

**11:10 – Noon | Consumer Relevance**

- ◆ Setting action standards for consumer-perceived differences
- ◆ Linking expert and consumer data
- ◆ Clinical vs. statistical significance
- **Litigated Case:** (S.D.N.Y. 2012) *Church & Dwight Co., Inc vs. Clorox Co. (cat litter)*
- 9) NAD Case #5974** (2010) *Comcast Communications, Inc. (Xfinity Internet, Television & Telephone Services)*
- 10) NAD Case #6025** (2010) *Bausch & Lomb, Inc. (PeroxidClear Contact Lens Peroxide Solution)*
- 11) NAD Case #6131** (2017) *Too Faced Cosmetics, LLC. (Better Than Sex Mascara)*

■ **Noon – 1:00 LUNCH** ■

**1:00 – 2:00 | Survey Principles**

- ◆ Answering questions
- ◆ Purpose of conducting surveys: Events and behaviors, attitudes and beliefs, subjective experiences
- ◆ How respondents answer questions: Optimizing and satisficing
- ◆ Filters to avoid acquiescence and no opinion responses
- ◆ Survey questions: Biased, open-ended vs. closed-ended
- ◆ Steps to improve survey questions

**2:10 – 3:00 | Consumer Perception Surveys**

- ◆ A survey must include: Sample, design, questionnaire, analysis
- ◆ Reliability and validity: Ecological, external, internal, face, construct
- ◆ Bias: Code, position
- ◆ Task instructions – importance and impact
- ◆ Data collection methods
- ◆ Target universe and size, controls, biased questions, improvements in design and analysis
- ◆ Design Issues: Monadic vs sequential monadic (within subject), separating open-ended questions from close-ended
- ◆ The stimulus is the label or ad, not the product itself
- ◆ Why open-ended questions are not a good basis for quantification
- ◆ Common design flaws

**THURSDAY (APRIL 22, 9am - 3pm ET)**

**9:00 – 10:00 | How NAD Has Ruled on Perception Surveys**

- ◆ Consumer takeaway surveys: NAD perspective, critique of cases
- 12) NAD Case #5849** (2015) *T-Mobile USA (More Data Capacity)*
- 13) NAD Case #5926** (2016) *Comcast Cable Communications (Xfinity Cable TV)*
- 14) NAD Case #6009** (2016) *Epson America, Inc. (Epson EcoTank Supertank Printers)*

**10:10 – 11:00 | Consumer Takeaway Survey Research**

- ◆ Independent research on the Bayer Advanced fertilizer case
- 15) NAD Case #6033** (2016) *Bayer CropScience US (Bayer Advanced 3-in-1 Weed and Feed for Southern Lawns)*

**11:10 – Noon | Analysis - Interpretation and Communication**

- ◆ Hypothesis testing
- ◆ Determining statistical significance and confidence bounds
- ◆ Communicating claim requirements to the business side
- 16) NAD Case #5569** (2013) *InterHealth Nutraceuticals (Zychrome Dietary Supplement)*
- 17) NAD Case #5755** (2014) *The Procter & Gamble Co. (Olay Sensitive Body Wash)*
- 18) NAD Case #6236** (2018) *Abbott Nutrition (Similac Human Milk Fortifier)*
- **Litigated Case:** (S.D.N.Y. 1994) *Avon Products vs. S.C. Johnson & Son, Inc. (Skin-So-Soft)*

■ **Noon – 1:00 LUNCH** ■

► **THURSDAY** *continued...*

**1:00 – 2:00 | Test Power**

- ◆ The meaning of power
- ◆ Planning experiments and reducing cost
- ◆ Sample sizes for claims support tests
- ◆ Managing Risks: Advertiser claim, competitor challenge
- 19) NAD Case #6065** (2017) *Shell Oil Co. (Shell V-Power NiTRO+ Premium Gasoline)*
- 20) NAD Case #6164** (2018) *The Procter & Gamble Co. (Finish® Quantum® Max Automatic Dishwasher Detergent)*

**2:10 – 3:00 | Handling No Difference/No Preference Responses**

- ◆ No preference option analysis
- ◆ Power comparisons: Dropping, equal and proportional distribution
- ◆ Statistical models and psychological models
- ◆ ASTM recommendation
- 21) NAD Case #5453** (2012) *Ocean Spray Cranberries, Inc. (Ocean Spray Cranberry Juice)*
- 22) NAD Case #6037** (2016) *Mizkan America, Inc. (RAGU Homestyle Traditional Sauce)*

**FRIDAY (APRIL 23, 9am - Noon ET)**

**9:00 – 10:00 | Testing for Equivalence and Unsurpassed Claims**

- ◆ How the equivalence hypothesis differs from difference testing
- ◆ ASTM requirements for an unsurpassed claim
- ◆ The paradox of finding support for superiority, unsurpassed, and equivalence; the need for a minimum standard for superiority
- ◆ FDA method for qualifying generic drugs: The TOST
- 23) NAD Case #5609** (2013) *Starbucks Corp. (Verismo Single-Serve Coffee System)*
- 24) NAD Case #5822** (2015) *Kimberly-Clark Global Sales, LLC (Huggies® Little Snugglers Diapers)*
- 25) NAD Case #5829 and NARB Panel #202** (2015) *Bayer HealthCare, LLC (Claritin and Claritin-D)*

**10:10 – 11:00 | Ratio, Multiplicative, and Count-Based Claims**

- ◆ The difference between ratio and multiplicative claims
- ◆ Examples of multiplicative claims
- ◆ Count-based claims (e.g., “9 out of 10 women found our product reduces wrinkles”)
- 26) NAD Case #5107** (2009) *Ciba Vision Corp. (Dailies Aqua Comfort Plus)*
- 27) NAD Case #5416** (2012) *LG Electronics USA, Inc. (Cinema 3D TV & 3D Glasses)*
- 28) NAD Case #5484** (2012) *Reynolds Consumer Products (Hefty® Slider Bags)*
- 29) NAD Case #5779** (2014) *S.C. Johnson & Son, Inc. (Scrubbing Bubbles Heavy Duty Cleaner with fantastik & Scrubbing Bubbles Bleach 5-in-1 All Purpose Cleaner with fantastik)*
- 30) NAD Case #5934** (2016) *Rust-Oleum Corp. (Painter's Touch Ultra Cover 2X Spray Paint)*

**11:10 – Noon | “Up To” Claims and Conclusion**

- ◆ Definition and support for an “up to” claim
- ◆ FTC opinion on windows marketers claim
- ◆ “Up to” energy savings claim at the NAD
- 31) NAD Case #5876** (2015) *The Procter & Gamble Co. (Duracell Coppertop & Duracell Quantum Alkaline Batteries)*

**THIS COURSE WILL BE PRESENTED VIA**



Due to Covid-19 travel restrictions, this course will be presented using the Zoom video meeting platform. You will be sent a link by email to join the meeting with the speakers and other attendees. All supporting materials will be mailed to you before the event, so please register early to allow for sufficient shipping time.

