

Where Have All the Respondents Gone?

Executive panel on market research addresses respondent cooperation. The AMA and SPSS Inc. recently launched an executive panel for leaders within top market research agencies to collaborate, debate and address some of the critical issues shaping the industry today. Their first conference call was held July 24, and focused on the topic of respondent cooperation. The following summarized transcript from this call offers perspectives from industry experts and agency executives on improving respondent cooperation.

Chakrapani: Over the years we've seen steady erosion in respondent cooperation. A little more than 60 years ago, when George Gallup was polling Americans, the response rate was about 80 percent. Now it hovers around the 20 percent range and has been steadily declining. Modern technology has made it easy for respondents to screen out all calls that are not personal. Some telemarketers' tactics have blurred the difference between marketing research and sales pitches. Many respondents can't tell the difference between a telemarketer and a marketing researcher. Privacy concerns and privacy legislation also play a major role in all this. Yet without respondent cooperation much of the input we need for policy decisions, social decisions and marketing and advertising decisions will be severely hampered. We need to understand under what conditions respondent non-cooperation adversely affects the validity of the results and must learn how to better construct the questionnaire to get higher respondent cooperation. We need to understand how to leverage technology to understand and counter such non-cooperation.

Glaser: There is a notion that respondent cooperation continues to fall. My question is when and where did it level off and what are our prospects for building up past losses? How great is the threat and what does it mean to research practitioners? And what are we doing about this problem as a profession?

There's been a lot of disagreement about what response rates mean and what is a sufficient level of respondent cooperation. The United States government, for example, has

a rule. It demands around an 85 percent response rate for the research it purchases or conducts. If it's lower, it requires studies that examine the quality of the data. This is set by the Federal Office of Management and Budget.

In contrast, academics usually have a rule of thumb of getting about a 50 percent response rate for their publications. So if they're going to publish study results in a journal, they want to aim for at least 50 percent response rate.

And of course for your average marketing research study, 20 percent appears to be a good level to maintain. So which one of these is acceptable? What the profession has learned over the last 10 years or so is that having a high response rate doesn't mean your results are free from non-response error (or any kind of bias) and having a low response rate doesn't mean your research has errors. What causes the problem is when the folks who don't participate are linked in their attitudes, behaviors, beliefs and attributes to what you're studying.

In the United States, my organization, CMOR, has a mission to improve respondent cooperation. We do this through a multi-faceted approach. We conduct studies, research on research and hold workshops and conferences. We have a public relations campaign dedicated to serving the status of research in the public mind. The marketing research segment of our profession is designing different interactive formats and interesting ways to take surveys that can really change that notion of participating in research. The important part is to think about when non-response is linked with what you're studying.

Chadwick: I would like you to think about the phrase “respondent cooperation.” There’s only one other industry that I’m aware of that has respondents, and that’s the legal industry. And if you’re a respondent in the legal industry, something not very nice is happening to you. You are on the receiving end. And I think in this instance it gives an indication of our view of people who cooperate with us in research. Indeed the very word cooperation is quite distanced from say, collaboration. So we already have a mind-set that is a little unidirectional.

We assume people don’t want to talk to us about the things that we’re interested in—brands, advertising, social issues or whatever it may be. Yet we know from the real world that indeed people do want to talk about the facets of their lives that interest them. People are like diamonds. They have many different facets, many different faces. So if you talk to me about classic cars, for example, I’ll talk to you all day but, if you want to talk to me about detergents, I’m going to have to be incited pretty highly. But we find people communicating through blogs and social networks. If you listen to the telephony data and conversations each day, you’ll find that people reference perhaps 10 brands a day. People are talking about brands and marketing.

Perhaps it’s time to change some of our basic thinking. To think about how we use communities, to think about how we interact with people in social networks. It’s interesting

that social networks are not just now the purview of younger generations. Things like LinkedIn are immensely useful for interaction, and online ethnography is now receiving an enormous amount of attention. Ethnography is not new, but the idea of observing people and interacting with them in their own environment is a lot more empathetic than just asking a stream of questions.

Technology clearly has had a lot to do with where we are now. We have already heard about the impact of caller ID and technologies of that sort, but we also hoped technology would help us in the online world where now 45 percent of research is undertaken. I would submit to you that the online revolution is already failing us. Have you taken an online survey recently? They are without doubt almost universally mind-numbingly boring. We have taken all that we were doing badly on the phone and in other methods and transferred it online. This is not a profession that is doing well by its primary resource. We are not making it an engaging process. Is it any wonder therefore that the general public shies away from the way in which we want to talk to them? But not the way in which they want to talk to us. Is it any wonder therefore that we’re now getting problems in terms of professional response and bad respondents?

Now this may seem a little harsh, but I think there is a lot of work to be done to try and work out the basics of how we interact with people in the modern age. I also think we’re



Panel participants



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Patrick Glaser is director of respondent cooperation at the Council for Marketing and Opinion Research (CMOR). In his role at CMOR, Glaser oversees the design, implementation and analysis of studies and works on developing solutions to improve respondent cooperation. Prior to joining CMOR, he worked for numerous public and nonprofit research projects. His expertise and interest span across telephone, Internet, mail and in-person data-collection methodologies.



Simon Chadwick, managing partner at Cambiar and former global CEO of NOP World, has led a number of research, consulting and CRM companies within the WPP Group. Throughout his 27-year career, Chadwick has been actively involved in market research associations including serving as a chair of CASRO, on the board of trustees of the Marketing Science Institute and the board of advisors of the masters in Market Research Program at the University of Texas, Arlington. He is also a fellow of the Market Research Society.



Colin Shearer is senior vice president of marketing strategy at SPSS Inc. He is a pioneer of data mining and, in the early 1990s, created the award-winning Clementine system. Shearer has led a worldwide team of data mining consultants for SPSS's advanced data mining group and also heads the SPSS consumer analytics business center.

going to have to rewrite a lot of our best practices and we're going to have to deal technologically with some of the worst problems online in terms of data quality. My plea to you today is that, as we go back to where we're putting studies together, let's think about how we engage with people that we want to talk to and make them want to talk to us.

Shearer: What I want to look at is the data that describes the respondents, the panels, the processes and the practices around them. When it comes down to it, at the core of these approaches we're trying to find anomalies and patterns in data. We're trying to find things that help us make decisions.

Some people are bad respondents, either those who are casually going through and taking incentives simply to speed through or, in some cases, a more systematic kind of deception or fraud. The beauty of this approach is that the pattern

recognition, the anomaly detection, finds these patterns and signatures and allows the expert to get in and investigate. Typically the indicators of particular points of abuse are then institutionalized. They are set up as checks that can very quickly and efficiently filter out bad responses. We're talking about the types of techniques here that detect anomalies to help spot new patterns emerging as people try new ways to get around the system. In turn, these are the technologies that allow you to stay one step ahead as new data comes in to recognize new suspicious patterns.

The second area is about building value out of respondents and out of the panels that contain them. If you look at how these types of predictive analytic technologies and data mining are used in commercial operations, the biggest application area is in the area of customer relationship marketing (CRM). In a nutshell, they're trying to do three things with

their customers. They're trying to attract and acquire more customers and better customers. They're trying to grow value out of existing customers and recognize customers who are both valuable and who are retention risks. And what I'd like to propose is that you can actually look at respondents in the same sort of way. You can see the need to acquire more and better respondents. And if you're able to understand the types of respondents who've come on board, you're able to go out and try and find more people of similar profile. Then find the profiles of people who are good fits for particular types of topics. So you can acquire not just more respondents, which is simply a numbers game, but you can also go and try and find better suited respondents for particular requirements.

The final phase is addressing low response rates. And when you see how these technologies have been applied—for example, by wireless telecoms that are suffering retention

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rates of more than 2 percent of their customer base going per month—you can see that these techniques have been used to meet a very pressing business problem. The issue is similar here with people casually passing through and being turned off and not being loyal. You have to try to understand who is going to go. Try to anticipate, which is where the predictive part of predictive analytics comes in. Look at the members of your panel for example. Look at the patterns of their responses and participation and look at any other interactions you have with them and any other data. Based on the history of people that passed, you should be able to predict the ones who are flight risks and be able therefore to take some sort of action to retain them.

Chakrapani: In general, what is being done to increase respondent cooperation across all methods?

Shearer: I talked about techniques that can be used. However, I don't think it's fair to say many organizations are yet using them. I think there's a realization that these techniques can bring value but I'd like just to make a distinction between the types of approaches I've been talking about and other approaches that could be or have been tried. Again there are analogies to this in marketing, which is to simply go out and take a panic measure and say we are short of people. Then let's spend a lot of money incenting lots and lots of respondents. And the difference between that and the analytics-based approach I discussed is very much a precision approach. Determine who has a propensity to sign up with you as opposed

to a one-size-fits-all and just try to see who you can get. Same applies to retention. You don't simply pour more resources into trying to keep everybody happy and loyal. You must try to keep certain people who are genuinely at risk loyal.

Chadwick: I think there are a number of innovations going on perhaps at the margins of the industry. One type of innovation is trying to look for people where they are most likely to be found in an environment that's going to interest them. So again, online hunting among social networks is proving to significantly boost response rates. And then in the engagement process, I think there are a number of companies particularly in the online space that are experimenting with things like instant messaging sessions during quantitative surveys. There's a U.K. company that has worked out how to make questionnaires alter themselves based on the responses that are coming in so that they're continuously relevant to the respondent.

Chakrapani: Another question is on the topic of clean calls and the rise of call screening. How is the industry dealing with attempts required to reach respondents?

Glaser: A lot of the time it's the organization determining what's acceptable for the project. It sort of ties into the previous question of what are we doing to improve respondent cooperation in all of these different forms. And I think the answer to that is all of the traditional things that have been done—the survey notification, all those types of things. The things that Simon and Colin spoke of are newer. They're more innovative, so more resources need to be funneled into experimentation in cooperation. I think there's market incentive to that, too. That's where things are headed.

Chakrapani: Colin, do new types of data need to be collected to use predictive analytics for fraud detection and participant detection? And the corollary to that is, are deep analytical skills required to use these approaches?

Shearer: Typically if you have basic information about who your respondents are, where they came from, how you recruited them, and what their responses are, it's enough to actually start readable analysis. But also you can begin to profile people for acquisition of new respondents. Would it be good to get better data? Absolutely. I think as people realize the value of this they'll want to collect more information about responders. For example, rich geo-demographic data based on the postal codes can be brought in. They would also want to collect attitudinal data in general. So, as well as having them in as respondents for particular types of surveys, also ask them things about themselves. The more you know, the closer you get to a holistic view of the respondents. Deeper insights will make it easier to model and predict their behavior. If you go back historically when these technologies first emerged, yes it was typically PhD statisticians and propeller heads who were needed to drive it. But these tools have moved on to the business side. So the intersections have been made much more usable by mere mortals who don't need

deep analytical skills and certainly not PhDs in statistics. They're perfectly usable in a normal business environment, too.

Chakrapani: We'll take a question from the audience.

Participant: As I listen to this, I worry that sometimes we as an industry have this sort of slash-and-burn approach to methodologies that in the end does not serve our purpose because it tends to undermine the confidence that our clients have in the work we do. And so, for example, the online evangelists starting five, seven years ago seemed to feel that they had to completely discredit telephone research in order to make the arguments for online. Now we're seeing the Web 2.0 social networking evangelists completely discredit or attempt to discredit online as a way to do research when in fact, if you look across all three of these methodologies (telephone, online and social networking), none of them is really perfect. None of them is really something we would go to clients and say, "Gosh if you just do this, then we can give you information that will pretty much guarantee that your business decisions will be sound and you'll be successful." This is the kind of stuff that then shows up in *Ad Age* and in front of clients and is kind of headlined in a sensational way. We need to emphasize the fact that we're in a point where we really need to be looking at multiple points of measurement. We need to look at different methodologies, understanding the strengths and weaknesses of each of them. But it really has to be a kind of synthetic approach rather than a one-time measurement approach, which is something we might have done 10 years ago.

Chadwick: Certainly I'm not evangelizing one method over another, but what I do feel strongly about is that I don't think many of the decisions being taken on the basis of the research that is put out there can be or is always that good given frankly some very poor standards of questionnaire design, respondent indirection design and survey design, which I as a serial panelist see and perceive day in and day out. So I am basically promulgating the need to step back from what it is that we've always been comfortable doing and challenging us to do a much better job using tools that are available to us that we don't necessarily use at the moment.

Participant: This question is on multi-modal interviewing. I was wondering where the panelists weighed in on the multi-modal. I have a feeling that 10 years from now we will be getting data in multiple points of contact. I sort of wanted to see what the panelists felt the landscape between here and there looked like.

Glaser: I tend to think that in the past there's been this sort of competition between all these different modes of data collection, and lately there's been much more discussion at industry conferences about using mixed-mode designs and how each

mode will complement others as opposed to fighting each other for preeminent status. The problem of course is in how you route respondents from one mode to the other and move them comfortably without scaring them off and without misunderstanding how to compare one mode to another in terms of the data analysis.

Shearer: I think that final point is very important. It's all very well being able to leverage these different modes or different channels but, if you're producing inconsistent data across them, then that's going to be a problem. So you really do need the ability and the tools and the capability to then] design your survey. Then perhaps there's certain bells and whistles enabled by certain different modes to roll it out across these different channels, the different modes collect the data but still unify it.

Chadwick: I strongly endorse what Colin was just saying and I do have concerns about multimodes. Not so much multimode with the same respondents but multi modes with different sets of respondents and bringing them together in the same design. In the old days we used to be told that was an absolute no-no, and I think there needs to be perhaps more work research on research done to look at the effects of it.

Participant: I'm looking at multimode in a different session. What I'm finding in the marketplace is that we can no longer rely on a single panel. We're never going to get back to the days of probability sampling, but we have to go to different panels to achieve, to fill in the gaps that panels might have. Some panels now are addressing younger populations, some are addressing cell phone populations, etc. That's a new multimode that we have to look at in order to reach these segmented populations.

Chadwick: I think what you're addressing is a systemic issue right now. As you say, many of the panels cannot handle single projects all by themselves. Indeed, if you do the math on most panel numbers, they're a statistical impossibility and there are usually fewer people on panels who are actually active and responding than would necessarily seem to be the case at first. So therefore I think we are now looking at sourcing from a variety of places, which really is just replicating what the panels themselves do.

Shearer: If you take the analogy with commerce where you have people who have signed up, who shop with different channels, then you know they're often trying to find the people who interact with them through their e-commerce channel. A lot of work needs to be done to understand what you're seeing coming in through the different channels or the different modes. Again, the more you can actually unify the data, understand the information, the better that will help to give a more holistic view of the respondent base. ●