

# Think Global, Act Local

Taking a hybrid approach to data collection and data dissemination

Tim Macer, meaning limited

# Agenda

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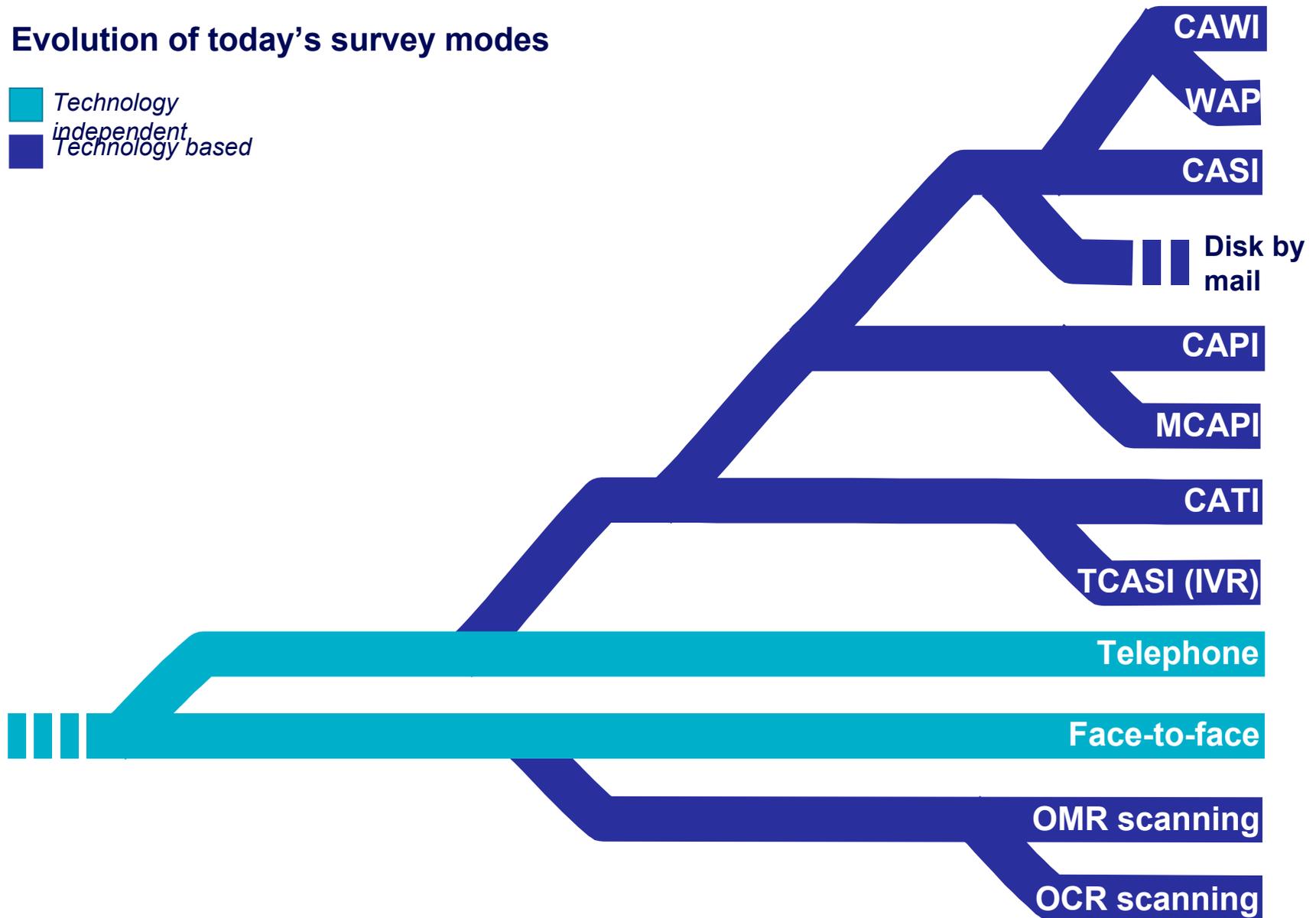
1. Complexity in the global village
2. A convenient portal in a storm
3. The case for mixed-mode research
4. Mixed-mode in practice

## It's a complex old world...

- Respondent rates are falling—globally
- Clients are researching more difficult markets
- Different countries favour different research methods
- Intense client pressure on costs
- Research competing against other info sources: CRM, consulting, market analysts, the Internet
- Research buyers are MBAs, not MR or marketing majors
- 'Everything else got easier'

# Evolution of today's survey modes

Technology independent  
Technology based

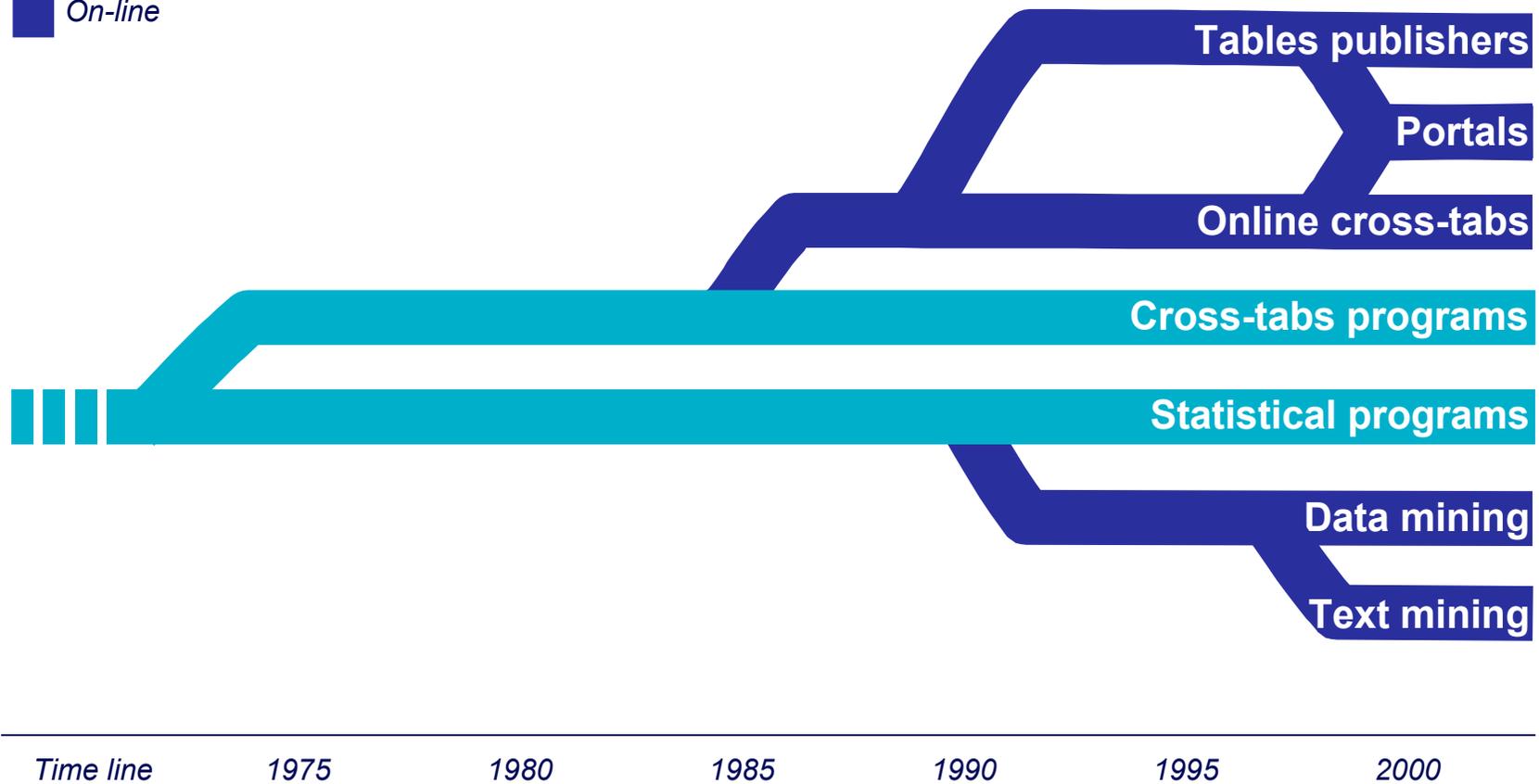


Time line 1975 1980 1985 1990 1995 2000

## Evolution of today's analytical modes

 Paper-based

 On-line



## 2. A convenient portal in a storm

The case for better analytics

## Too much choice?

- Analysis needs to take something from each strand
- Analytical tools must become convergent, not divergent
- Diverse audience now for research data
  - ▶ Must recognise different information needs and different levels of data literacy
- Research companies developing their own portals
- Common tools needed to avoid portal proliferation and portal monopolies

# Analysis or reporting?

- Much more effort has gone into data collection than analysis over the years
- Many tools in use are old and outdated
- Cross-tab still dominant as a delivery method
- Analysis still 'difficult'

## 3. The case for mixed mode research

Are there any benefits?

# Facing the inevitable

*"Survey organizations, whether they are in universities like mine, in private-sector organizations or in government organizations, are going to have to change dramatically in some ways in order to do effective surveys as we bring these new technologies online and still use our other technologies where they work."*

Don Dillman, Washington State University

## Mode switching to improve coverage

- Combining modes increases coverage
- Giving respondent choice increases participation
- Allison & O'Konis
  - ▶ Mixed Web/CATI survey of online financial services
  - ▶ Initial approach by CATI or Web with option to switch
  - ▶ 88% of CATI respondents agreed to a continue their interview on the web
  - ▶ 54% of them went on to complete
  - ▶ Different modes gave highly similar responses
- Their conclusions
  - ▶ Switching modes does increase response rate
  - ▶ Switching is most effective when it is immediate

# The risks

## ■ Calibration

- ▶ The same questions yield different answers in different modes, even from the “same” respondents

## ■ Coverage

- ▶ The same questions yield different answers because the populations contacted by each mode are not the same

## ■ Complexity

- ▶ There is more programming and operational effort involved in tackling more than one mode
- ▶ Fieldwork and back-office costs, and project timings can increase disproportionately

# Calibration issues

## ■ Don Dillman

- ▶ Total Design Method in 1978 to achieve consistency between phone and mail surveys
- ▶ Revised in 1999 to take into account Internet surveys
- ▶ Examined response rate measurement differences in experimental trials

## ■ Dillman's conclusions

- ▶ There are observable and systematic differences between modes
- ▶ This disadvantage is outweighed by overall improvements in sample coverage, response, time and cost

## The main modal differences in practice

- Completion rate
  - ▶ Higher response per question online
- The moderating effect of the interviewer
  - ▶ Leads to under-reporting of socially unacceptable responses
- Verbatims longer and/or more detailed
  - ▶ Research seems to show this is more a population effect than an intrinsic modal effect
- “Don’t know” and “No answer” answers
  - ▶ Picked more frequently in CAWI than in CATI
- and...

# Scale questions

- Humphrey Taylor (2000)
  - ▶ Observed a tendency for respondents to answer scale questions differently on the web
- Dillman et al (2001)
  - ▶ Characterised differences between CATI and CAWI on anchored scale questions (1=strongly agree etc)
  - ▶ CATI respondents favors the extremes
  - ▶ CAWI significantly more likely to use the entire scale
- Bäckström and Nilsson (2003)
  - ▶ Observed the same tendency between self completion on paper and web
- More research is required

## How influential is the population effect?

- The majority of differences can be explained by population effect
- Modal bias can be effectively 'designed out'
- Modal effect should decrease over time if more of the population has internet access
- Population effect is latent in unimodal studies, which does not mean it is absent!

## 4. Mixed & multi-mode in practice

Technological support required to meet the challenges of mixed- and multi-mode research

# What do we mean by multi-mode?

## ■ Multi-mode

- Surveys utilizing more than one research channel to reach different sub-samples, but confining each sub-sample to one channel

## ■ Mixed mode

### ▶ Serial

- Surveys that involve successive interviewing stages, each utilizing a different mode

### ▶ Parallel

- Surveys that allows participants to choose the mode and even to switch modes

LEVEL OF DIFFICULTY



# Operational complexity issues

- Different recruitment and screening
  - ▶ Can't always approach by same mode
- Duplication of the survey instrument
  - ▶ Complete duplication of effort may be required
  - ▶ Problems managing multiple versions
- Data Handling
  - ▶ Need data in one place in one format
  - ▶ Problems mixing online and offline modes
- Mode switching
  - ▶ Must be fast if response rate to be improved
- Mode-appropriate texts

# Mixed mode: 12 key requirements

1. Common survey authoring tool
2. Independence of design and execution
3. Mode specific texts (not through foreign languages)
4. Central database
5. Auto-determine contact mode from sample
6. Efficient mode switching *multimode*
7. Concealment of previous data when switching to self-compl.
8. Reminders and auto-revert to previous mode
9. Single view management & reporting tools across all modes
10. Quotas that operate across all modes
11. Question constructs that recognise different modes
12. Recording of mode at datum not case level

# Is BV Fusion a green light for multimode?

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# The score

Mixed mode

Multi mode

Not met	0	0
Partly met	3	3
Fully met	6	9

83%

88%

# Bellview Fusion for multimode: Verdict

## ■ Pros

- ▶ All requirements met either in full or in part
- ▶ Centralised database a big improvement
- ▶ Mode switching very strong + integrates with dialler

## ■ Cons

- ▶ Currently only CATI and CAWI: not CAPI
- ▶ Mode specific texts and questions are a bit clumsy and would benefit from more automatic support

## ■ Overall

- ▶ Among the best support of any products examined

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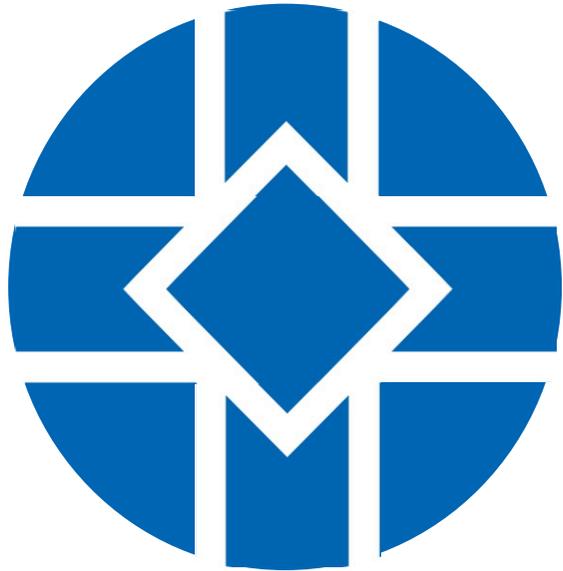
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