The Douglas Group

Response Rates: a Multinational Perspective

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RESPONSE RATES IN MAGAZINE MEASUREMENT

In recent years, the trade press and other journals have discussed a decline in response rates. In the United States we have heard of declines in response rates for A.C. Nielsen's personal meter from just over 50% to 37% as reported by CONTAM, and of course, the decennial census. With this issue surfacing for many marketing research surveys we were wondering how the major print syndicators were in fact doing.

The response rates for the large National Readership type surveys, with one major exception (UK), seem to have maintained response rates by spending a lot of money, increasing call backs, and shifting tactics to achieve completion.

The United States, like all of you, have experienced increased difficulties in obtaining cooperation from hard to interview populations including:

- Upper income professional males and females;
- Working mothers;
- Senior executives who run small to very large corporations;
- All upper income individuals;
- Anyone who lives in a building with a doorman or other high security building.

Are differential response rate a concern in countries with National Readership type personal interview surveys? As many of you can imagine this is a very difficult issue, since most the universes for the above categories are not known. An example of this difficulty is illustrated by table 1 from Simmons (USA) a personal interview survey. Those block groups in A Stratum are the most "up market" and difficult to interview with an index of 88.9 relative to the overall response rate. STRATUM IS DEFINED AS - all Enumeration Districts (ED's) and Block Groups (BG's) which are the smallest census defined units of geography. Each group of ED's and BG's was classified on the basis of (1) percentage of households with 1980 household income $25,000 or more and (2) percentage of households in which the household head attended or graduated college. MRI pattern is the same.

TABLE 1

	Stratum A	Stratum B	Stratum C	Stratum D	TOTAL
Total Eligible Adults	7,562	7,803	8,224	3,966	27,575
	100%	100%	100%	100%	100%
Interviewed	64.6%	71.1%	76.5%	79.1	72.7
Not at Home	13.9	10.6	7.9	5.8	10.0
Refused	17.2	13.5	11.5	11.1	13.59
Other Non-Interviews	4.3	4.8	4.1	4.0	4.31
INDEX OF COMPLETION RATE	88.9	97	105	108	100

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In the USA, Simmons and MRI are periodically audited by the Advertising Research Foundation. The difficulty and expenses of maintain the response rate are acknowledged by all observers. A special analysis being done by Val Appel and Julian Baim will further clarify the issue when it is published in the Spring of 1991. Dr. Baim reports and (hopefully Val Appel will comment in the open discussion) their preliminary analysis shows that responses do differ in the upper income strata when analysis using Prism Clusters is done. (PRIZM ("Potential Rating by Zip Markets" developed by the Claritas Corporation - Part of VNU - has rated all 35,000 zip, U.S. Postal Codes, areas in terms of population characteristics as counted by the Census and assigned them to 40 "zip market cluster." Europeans may be more familiar with Acorn, a competitor of PRIZM.)

THE PROBLEM IS MUCH OF THE MAGAZINE READING OCCURS AMONG PEOPLE IN THIS GROUP. If we are not completing the interviews the non-response could be drastically altering the outcome, because non-respondents are the best educated. We have not got a major problem in the U.S. yet, but difficult to maintain response among upper income households is getting very serious attention by the technical directors of the large syndicated services.

Is response rate concern and worry peculiar to the United States; or is it a worry in other countries as well? We need to answer this question to discover whether we are doing something wrong in our survey execution as well as to discover any particular techniques or methods employed elsewhere that can be imported here. Hopefully this paper will shed some light on where we stand relative to other countries regarding response rate trends and how to confront this problem of completing the interview with the up market informant.

Before looking at data from other countries in Europe and North America, it's necessary to offer some preliminary comments about making comparisons among response rates. Robert Groves observed that "there are so many different ways of calculating response rates that comparisons across surveys are fraught with misinterpretations."

The definition is provided below to aid us all in "reading from the same sheet of Music." CASRO is "The Council of American Survey Research Organizations."

> "Completion Rate is to be considered as a collective term that is used to designate how well a task has been accomplished. In general, completion rates are used to measure how well the various components involved in a sample survey are accomplished.
>
> "The term Response Rate is a summary measure and should be used to designate the ratio of the number of interviews to the number of eligible units in the sample. The response rate is a measure of the result of all efforts, properly carried out, to execute a study. In determining a response rate, completion rates are used to evaluate the component steps. These component steps are then combined to form the response rate.

"Basic Definition - Response Rate =
Number of Completed Interviews with Reporting Units
divided by
Number of Eligible Reporting Units in Sample"

Lester R. Frankel, Chairman
CASRO Task Force on Completion Rates

Besides differences in calculating response rates, the design of the sample, the number of callbacks, pre-alert procedures, interviewer training and questionnaire length or content can all affect response rate levels. Comments are made with these variables in mind.

We selected firms identified in Erhardt Meier's book "Summary of Current Readership Research" who execute major studies in the countries around the world. We contacted:

- Canada - PMB Print Measurement Bureau;
- France - Cesp Les Lecteurs de la Presse;
- Germany - MA - Media Analysis;
- India - India Market Research Bureau;
- Italy - Ispispress - & Isegipress;
- Japan - MMR - Mass Media Research;
- South Africa - Amps - All Media Product Survey;
- UK - National Readership Survey;
- USA - MRI - MediaMark Research Inc.
  SMM - Study of Media and Markets (Simmons).

Canada, South Africa, USA - Simmons, and UK responded in more detail than the others. Top line data were obtained from some of others. Suffering from a lapse in funds, time and energy we are also using data from work done earlier by Julian Baim for the Chicago Media Research Club "Case of the Missing Respondent."

All of the comparisons reported here come from studies similar in design and execution. All surveys on the following tables were designed to measure media, behavior and all lasted 30 minutes or more. Cesp in France is a quota sample for the major cities. We gather that CESP's move to quota sample was in part stimulated by the difficulty of achieving a good response rate with a probability sample.

It should also be clear that the data are, by no means, a comprehensive account of response rate trends in other countries. Most of the data were culled from research companies' technical appendices or from conversations with research directors. Additional data come from several international researchers' multi-country experiences.

RESPONSE RATE IN MEDIA SURVEYS

We first look at comparative data of major national media surveys. Table 2 shows response rate levels for a number of these surveys in Europe and North America.

There are several points to be made from this table.

- First, there is some variation among response rates across several countries. The levels range from 65% for Britain's NRS, to 83% for one of Germany's national media surveys. Neither the number of callbacks nor the length of interviews appear to correlate with response rate levels.
- Second, the response rates for the two national media surveys in the United States are quite comparable to those found elsewhere;
- Third, all of these national surveys conduct face-to-face interviews;
- Finally, the differences between countries do not suggest culturally-based explanations of response rates.

Table 2
Response Rates of Major National Surveys in Europe and North America

Country	Method	Interviews	Length	Rate	Attempts
United Kingdom					
NRS (1989)	Personal	28,500	37 min.	65%	5
Germany					
AGMA (1990)					
Press	Personal	20,700	50 min.	83%	8
France					
CESP (1987)					
Press	Personal	15,000	36 min.	72%	n.a.
Switzerland					
MS (Media 89)	Personal	9,200	35 min.	75%	n.a.
Ireland					
JNMR	Personal	5,000	35 min.	83%	4
Canada					
PMB (1989)	Personal	16,000 (2 year)	60 min.	65%	5 (max.)
South Africa					
AMPS (1989)	Personal	16,296	50-70 min.	76.5%	
United States					
MRI (1990)	Personal	20,000	50 min.	71%	6
SMRB (1990)	Personal	20,000	45 min.	72%	6

* Response rate is calculated only for cities with populations less than 100,000. For larger cities, a quota sample is taken.

In 1983, Dawn Mitchell, Chairperson and Managing Director of RSL Ltd., stated:

> There is a generally held view that response rates are falling in almost all European countries (the exception is Norway)...

This conclusion is partially supported by data from European media studies. Table 3 shows changes in response rates over time (the earlier, base year was provided by the research companies). The data show:

- The British, South African and Canadian press surveys showed substantial declines over the years;
- The declines in PMB (Canada) and South Africa are significant and seem to be a function of long term trends. Also Piet Smit reminds us that South Africa has had a rather difficult couple of years and the social and political winds of change intensify the problems of personal interviewing. Canada changed contractors and this level of response has been seen before. So it certainly seems like one of those on going worries is not a major problem.
- Similar to the USA, the German, Swiss and Irish studies' response rates were consistent over time. (It should be noted that the base years for the two of the latter studies were relatively recent and that trends may not be apparent over that brief time span.)

Table 3
Response Rate Trends - Europe/Canada

Study	Year	Response Rate	Year	Response Rate	Decline
UK					
NRS	1982	74%	1989	65%	-9.5%
France					
CESP Press	1977	72%	1987	72%	0%
Germany					
AGMA Press	1987	83%	1989	83%	0%
Ireland					
JNMR	1984/5	83%	1987/8	83%	0%
Canada					
PMB	1983/4	69%	1988/9	65%	-6%
Switzerland					
MS	1981	75%	1989	75%	0%
South Africa					
AMPS	1983	82+%	1989	76.5	-7.1
United States	See Table 4				

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A more detailed table of response rates from the U.S. shows an up and down pattern reflecting trouble at various times. The NRS seems to have a different pattern on the surface.

TABLE 4

(U.S.)	(UK)	NRS	MRI	SIMMONS
1982	'81	74.2%	71.2	73.67%
1984	'83	72.9	70.1	73.34
1986	'85	69	66.3	75.58
1988	'87	67.0	68.8	76.38
1990	'89	65.0	70.1	72.38

The NRS seems more problematic. I am not sure. Consider Erhardt Meier's observations that he provided with this data:

> The NRS has suffered a decline in response between 1981 and 1989 as detailed above. Of non-response, particular note should be made of the steady increase in refusals as a proportion of all non-response.
>
> There is an inherent difficulty in identifying demographics as a factor in non response as demographics are themselves a survey finding of the NRS, rather than part of the sample design. It is therefore difficult to accurately describe non-respondents. However our best estimate, achieved through NRS interviewer ascribing age, sex and social grade demographics to non-respondents, would suggest that these characteristics play a part in the non response although in varying degrees.
>
> The NRS has in the past encountered most difficulty in obtaining interviews with males and those informants in the younger age group 15-24. Lack of availability is the most likely reason for non response in these groups.....

Table one showed that the higher the income in the United States as best as we could identify the lower the response with personal interviews.

South Africa and the BMRC - UK (Business Man's Survey) show the higher the respondent income the more difficult it is to get their cooperation.

	Whites	Asians
Less 400R	75.6	86.2
R6000 +	55.6	72.2

BMRC Businessmen Response Rate 1990

Category	
A	56.9%
Highest Status, Outer Met Post '81, High Status, Newish housing, High Status Post war with school age children	
E	63.7%
Low income, Overcrowded, Flats above shops Council house, old terraces etc.	

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In other studies for which earlier data have not been made available, the researchers have generally agreed that response rates are declining. Ingemar Lindeberg, Media Research Director for the Swedish Orvesto studies, indicated that response rates have declined by approximately 10% over the past 15-20 years.

Off the record conversations with European technical directors and users held with technical directors suggest the NRS's decline in response rate and the acknowledged expense in maintaining the response rates at Simmons, MRI and AGMA suggest that GETTING THE BEST MAGAZINE READERS TO RESPOND IS STARTING TO BECOME A MAJOR PROBLEM.

JNMR researchers in Ireland, despite the consistency of their study's response rates, agreed that "response rates are tending to decline over recent years." AGMA's success at attaining response rate levels was attributed to spending "lots of money." However, other market research studies in Germany have shown sharp declines. For example, one continuous door-to-door study from 1953 to 1979 experienced a response rate decline from 91% to 76%. A second, similar German study indicated a response rate drop from 67% to 59% in a five-year span from 1979 to 1984. Thus, the AGMA 80+% response seem unusual, even for Germany.

In the United States a big concern among my clients is the potentially lower levels of availability of the working woman for in home interviews. More than 60% of all females over 18 work. Many now have children. This group of women's time is valuable. They can read because magazines and newspapers are portable, but are they cooperating? Where is the data? Is a concern a problem if you do not have data? Working women is not a really analyzed segment with respect to response rate. The universe problem again. Perhaps Paul Donato and the Apple/Baim analysis to be released later in the year will provide the USA data to prove there is a decline in response of important A Stratum sub-segments. Once the segments are identified we will then have to consider adapting segment specific tactics to capture those interviews.

Erhardt hit the problem on the head. You don't know since they don't respond. I think it is time for more experiments. Paul Donato will be sharing some with you later and hopefully others will come up in the general discussion.

ADDRESSING THE PROBLEM

Researchers in other countries have taken steps to confront the issues of non-response. In most cases, the measures are similar to efforts here in the USA. Here are some examples:

- Research Services Limited added another callback attempt in January 1988. They attributed a small increase in the 1988 response rate to the new fifth attempt. (It should be noted that the response rates again declined in 1989.) They claimed that the new rule reduced the number of no replies, not at homes and aways in the response rate calculation. Investment of more £'s may cure the short term as it has in Germany and USA.

- PMB in Canada employs a "differential callback treatment" to different areas of the country. In the larger cities, more callbacks are attempted to reduce non-response. This method represents a cost efficient use of interviewers, concentrating time and money in areas with traditionally low response rates.

- Tim Bowles of the MRB Group in the UK has written about creating "special pay rates" for interviewers in difficult areas as well as using "permanently employed, mobile interviewer teams" to overcome respondent resistance.

- Collins et al. discuss the timing of call, appointment scheduling, advance notification, refusal conversion specialists and the quality of interviewing as areas to address. In the technical appendices reviewed, there is little said about giving incentives to respondents. In fact, Germany's AGMA survey specifically mentioned that no incentives are offered and still the response rate was 83%.

One of the authors (Steve Douglas) has proposed interviewing the respondent in any location that the respondent chooses when that respondent is a hard to get working mother or executive. The notion is to bring lunch and $100 to stimulate the responded to sit down and participate in a personal interview. This introduces another technical effect - place of interviewing. It has been shown that place of interview favors Business Magazines over News Magazines and Playboy for example. Perhaps an experiment on wording and interviewer instructions could reduce or illuminate the effect giving no advantage to test one type of publication over another in this setting.

Only Bowles (and Douglas) mentioned the possibility of using monetary or gift incentives to motivate respondents. In sum, these efforts are quite similar to those employed in the United States, but none appears to be a panacea for declining response rates.

There are, however, two approaches to major media studies in Europe which effect response rates and warrant brief comments.

First, unlike in the United States, several of the major media studies in Europe (Germany's AWA study and France's CESP survey) use quota samples. The use of non probability samples raises issues of calculating a meaningful response rate as well what measures, if any, there is of sampling error for these studies. Nevertheless, quota samples seem to be more widely accepted in Europe (at least, for some studies) and their existence can obscure the non-response issue.

Secondly, the use of fusion to merge two independently collected data bases is more prevalent in Europe. Because fusion helps shorten the interview time for the separate studies, there may be an increase in response rate. Fusion is thus not only a statistical technique to "merge data;" it is also a means by which the respondent's "burden to respond" may be eased. We cannot avoid investigate this technique as a way of increasing response rates.

THE FUTURE

This has been only a brief discussion of multinational response rates. Much still needs to be learned about trends in other countries. As more is written about the issue in Europe, the picture painted here may change. New findings may confuse or even baffle those seeking to gain a handle on reasons for non-response.

At present, we can be reassured that the difficulties in maintaining response rates in the United States are not unique. Response rates are declining (or are increasingly expensive to maintain).

We must all take steps to continue to study and report success and FAILURES in maintaining response rates. We will in the USA. We should not avoid that problem and we should confront it.

Once a segment of the population is identified, we must aggressively test alternatives to achieve response with the minimum disruption in the data.

This issue is critical to the users and sponsors of this data the media owners. After all we are dealing with what Brian Allt called the "Press Negotiation Index." I am really looking forward to the discussion of these important subjects.

Appendix A

Simmons Response Rate

INFORMATIONAL SURVEY FOR RESPONSE RATE SURVEY
TO BE PRESENTED AT THE 1991 READERSHIP SYMPOSIUM

USA - Simmons

1990

	Stratum A	Stratum B	Stratum C	Stratum D	TOTAL
Total Eligible Adults	7,562 100%	7,803 100%	8,224 100%	3,986 100%	27,575 100%
Interviewed	64.6%	71.1%	76.5%	79.1%	72.07%
Not at Home	13.9	10.6	7.9	5.8	10.00
Refused	17.2	13.5	11.5	11.1	13.59
Other Non-Interviews	4.3	4.8	4.1	4.0	4.31

1988

	Stratum A	Stratum B	Stratum C	Stratum D	TOTAL
Total Eligible Adults	4,315 100%	8,068 100%	8,543 100%	4,277 100%	25,203 100%
Interviewed	67.3%	74.1%	79.9%	82.8%	76.38%
Not at Home	12.5	10.2	7.7	6.1	9.03
Refused	17.6	11.5	10.1	7.7	11.43
Other Non-Interviews	2.6	4.2	2.3	3.4	3.15

Continued

USA - Simmons

1986

	Stratum A	Stratum B	Stratum C	Stratum D	TOTAL
Total Eligible Adults	4,349 100%	8,092 100%	8,603 100%	4,287 100%	25,331 100%
Interviewed	66.5%	73.2%	79.0%	82.6%	75.58
Not at Home	13.7	9.8	8.0	6.6	9.32
Refused	14.0	11.7	7.8	5.2	9.67
Other Non-Interviews	5.8	5.3	5.2	5.6	5.43

1984 OR 1983

	Stratum A	Stratum B	Stratum C	Stratum D	TOTAL
Total Eligible Adults	4,586 100%	7,217 100%	9,818 100%	4,434 100%	26,055 100%
Interviewed	61.5%	70.9%	77.2%	81.1%	73.34%
Not at Home	17.7	14.2	11.3	9.4	12.89
Refused	15.4	10.5	7.6	5.2	9.38
Other Non-Interviews	5,4	4.4	3.9	4.3	4.37

1982

	Stratum A	Stratum B	Stratum C	Stratum D	TOTAL
Total Eligible Adults	4,876 100%	6,460 100%	9,321 100%	5,189 100%	25,846 100%
Interviewed	61.4%	71.3%	77.6%	81.0%	73.64%
Not at Home	14.0	10.0	9.1	9.7	10.35
Refused	22.1	15.0	10.7	6.9	13.16
Other Non-Interviews	2.5	3.7	2.6	2.4	2.82

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