EMBRACING TECHNOLOGY IN READERSHIP SURVEYS

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Background

The rapid increase in digital technology is transforming many industries including the market research sector. A seemingly never-ending stream of new technological developments has been coming into the market in recent years, developments which require careful assessment and potential deployment in the companies for which we all work. Technology is unquestionably providing cheaper and faster research for the client. What is also true is that, to remain competitive, all businesses need to be aware of the new technologies that are available to them, and to be able to apply them to any parts of their business very quickly, where appropriate.

TGI, BMRB's syndicated product and media consumption survey, is no exception. The study is a 25000 sample postal survey with recruitment undertaken on the back of the BMRB Omnibus. This method has remained unchanged for many years. In general, 70% of Omnibus respondents agree to complete the TGI questionnaire, of which 50% return a usable version, one that satisfies our stringent quality procedures. However, as is the case for all types of surveys in recent years, be they face to face, telephone, postal or even Internet surveys, response rates have been falling. This is something we have all had to battle against with ever more creative methods.

Even for what can be described as a fairly traditional type of survey such as TGI, it has been incumbent upon the TGI team to look continuously at all elements of the research survey process including questionnaire design, fieldwork, reminders and data delivery, to see how new technology might improve the way we operate and to make the research process more efficient. Specifically, can the new technology add value to the product, will it improve quality, or will it reduce costs. Or, if we are really fortunate, can the new technology deliver on all three fronts.

Questionnaire Delivery – The Move Online

One of the key aspects of the survey process which TGI has focussed on is that of questionnaire delivery. At the last Readership Symposium in 2005, Jenny Davis and Martin van Staveren of BMRB, in their paper "Response Rates – A time for Action", outlined BMRB's plans to pilot the full TGI questionnaire online. Naturally we had been conscious of the growth of online research for some time and felt that, at the very minimum, we should investigate it to assess its appropriateness for TGI.

The pilot went ahead as planned at the end of 2005. Since then the project has followed two strands. Firstly, to compare the results from the paper survey against the online data; secondly, to devise a process which would provide flexible questionnaire updating, scanning definition, data processing and delivery mechanism, all in one package. That is, could we build a seamless data collection, processing and reporting system that combined two methods of interviewing, namely paper and online? Our long term intention was not to move TGI totally online, but to offer respondents the option of doing the TGI survey online or on paper, once we had recruited them at the omnibus stage.

The online sample was obtained using the BMRB's face to face Omnibus in keeping with the current TGI recruitment method. Respondents were offered a choice between the standard paper TGI and the online version. Respondents who chose the paper version were told this was in fact fully subscribed, and asked if they would "convert" to the online version.

The response rates using the BMRB Omnibus recruitment method were as follows:

	Sample	%
Attempted	2049	100
Accepted	1363	67
Chose Online	527	26
Online inc conversions	640	31
Final usables	188	9

The BMRB Omnibus sample was supplemented with 243 respondents from the Lightspeed Panel, a Kantar Research company which operates online panels throughout the world. This gave us a total of 431 online interviews.

For both samples, the questionnaire was distributed using web-links in emails, in three separate sections of approximately one hour each. Bear in mind that the TGI questionnaire is 115 pages long and therefore takes a considerable amount of time (approximately 3 hours) to complete. After each online section had been completed, respondents were emailed a link to the next section. An incentive of £20 was provided on completion of all three sections.

There was in fact quite a sharp decline from the number who agreed to do the questionnaire compared to the number who finally completed a usable version. Of all those who agreed to take the TGI questionnaire, 29% completed all 3 versions in accordance with TGI's quality standards.

	Sample	%
Agreed to do questionnaire	640	100
Email successfully delivered	578	90
Completed Stage 1	307	48
Completed Stage 2	229	36
Completed Stage 3	204	32
Final Usables	188	29

Profile Comparisons

One of the issues TGI has to face, in common with many other surveys is the relatively older bias of the sample; that is, the problem of getting younger respondents to complete the questionnaire. By offering an online version we felt that this might, in part, be addressed. Looking at the profiles of the online pilot against the paper TGI sample, there was some room for optimism on this front. As can be seen, the online pilot revealed a younger profile:

	Online Pilot (%)	TGI Paper (%)	GB Pop (%)
15-34	31	21	32
35-54	49	36	35
55+	19	43	34

Similarly, we were also keen to improve the social grade profile of the current TGI sample. By offering an online version we believed that TGI would attract more ABC1s, and thereby improve the overall structure of the sample. Again the signs look positive judging the results achieved in the pilot, with a marked ABC1 profile being noted:

	Online Pilot (%)	TGI Paper (%)	GB Pop (%)
ABC1	58	47	55
C2DE	42	53	45

The results of the online pilot in terms of the age and the social class profile indicate that the overall sample profile of TGI should improve, once online represents a reasonably significant proportion of the total TGI annual sample.

Data Comparisons

Results from the online pilot were compared with data from the main GB TGI. It was ensured that 'Home Internet Users' were used as the benchmark from the standard TGI database, as they provided a closer comparison to the online pilot sample.

In general, the online pilot data compared favourably with Internet users on the main TGI across most product categories. That said, the pilot respondents appeared to have been drawn mainly from more experienced Internet users, and this led to some differences on technological items.

As far as print media was concerned, the number and types of publications presented in each section varied (NB: the online questionnaire was placed in three sections). For example, the first section contained 39 titles. These were predominantly women's fashion magazines (e.g. Cosmo) plus some men's magazines (e.g. FHM). The second section contained 93 titles of various sorts – gardening, hobbies and sports, environmental interests, health and family interests, home interests and motoring. Finally, the third section comprised music and computer titles, newspapers and supplements, weekly newspapers, programme magazines and women's weekly magazines.

The online data from the Omnibus sample only is shown here. For comparison purposes, the un-weighted TGI data are shown as well as data for the NRS, which is the benchmark readership survey in the UK.

Average Issue Readership

	Online Omnibus (%)	TGI Paper (%)	NRS (%)
Daily / Saturday Newspapers	54	67	72
General Weekly magazines	53	40	51
Women's Monthly Magazines	75	78	74

Although the results for newspapers were a little on the low side, the magazine data stood up well. Respondents who are frequent Home Internet Users (and who are more likely to complete an online TGI) are less likely to be regular readers of newspapers. However, we intend to monitor the results as the online survey becomes more established and decide on any course of action.

Future Plans

Given the success of the pilot and the fact that we were able to design a paper questionnaire and online system, which worked together, we decided to offer respondents the option of taking the questionnaire on line or via paper from the end of August 2007. We are taking things cautiously for the first quarter and will cap the total number of online interviews at 10%, gradually increasing to 20% throughout 2008. Data trends will be carefully monitored.

New Technology in Questionnaire Reminders

TGI has traditionally used postal reminders to encourage respondents to return the questionnaire, a combination of personalised letters and postcards. The first reminder goes out two weeks after placement, while the others follow at weekly intervals. The first three reminders ask the respondent to send back the completed questionnaire, whereas the fourth is more direct and asks for the return of the cash incentive, if the recipient does not wish to participate. Although this is a well tested process, it can be slow and costly as it relies on many factors, as well as going through many stages – sampling, printing, despatch and finally the national postal system.

In the light of the significant role that technology plays in people's lives nowadays, we felt that this crucial part of the survey process was in need of a radical change. It was important to think beyond the process itself such as number of reminders or different time intervals and focus on the method in which we communicate with the respondent. As we are all aware, mobile and electronic devices have shaped new ways of communicating with people. This provides us with a degree of flexibility so that we can reach people through different media by using a mixed mode approach. We hope this will ensure a more effective, broader and quicker reach while keeping costs down. To this end, TGI has been piloting new techniques for reminders: automated voice messages (AVMs) in 2006 and, during the course of 2007, SMS text reminders. What was the effect of these initiatives on response rates? Was there an improvement in the sample profile? And were there costs savings to be achieved?

Automated Voice Messages (AVMs)

Automated voice messages (AVMs) are recorded audio files sent to respondents' landline telephones. They can be picked up live or be redirected to a voice mail system. The strengths of the AVM methodology compared with the traditional postal one were identified as:

- being a much more dynamic medium
- significantly less expensive
- one which provides more control on delivery and receipt of the message.

TGI Premier is a continuous survey conducted among social grade ABs aged 20 years or over. The questionnaire is placed on the back of the BMRB Telephone Omnibus and, given that we already had everybody's telephone number, the survey lent itself perfectly to piloting AVM reminders. The objective was to assess if this new reminder method would be more cost effective and deliver at least the same level (if not higher) of useable returns.

A reminder script was recorded by one of our female executives, the following is an example of reminder 1:

This is a message for _ _ _ _ _ _ _ _, from the British Market Research Bureau.

Thank you for speaking to our interviewer recently and agreeing to take part in the 'Your Lifestyle' survey. You should now have received your questionnaire. I appreciate that filling in the survey is quite a lengthy task, however many people have found it to be an interesting one. Every individual's answers are important in a study like this, so I would be grateful if you could return the completed booklet as soon as possible.

If you have not yet received your questionnaire, or have any other problems, please call our helpline number on…

To repeat this message please press one now [Live calls only]

Thank you and goodbye

The trial involved replacing the three postal reminders with AVM reminders and was run for four weeks. Response and weekly usable questionnaires returns were monitored as well as delivery and receipt of the messages sent. In the end, the results from the Premier trial were so encouraging that the method was rolled out permanently from January 2007.

The proportion of messages successfully delivered currently exceeds 90%, either picked up live or by answering machines. The new method also highlighted the opportunity to save costs compared to the traditional print/postage method. In fact the new AVM method produces a 50% cost saving, even if response rates stay the same as previously. However, the AVMs have so far yielded a top line increase of 4% in response rates, compared to the response rate achieved with the previous postal method. This, of course, has compounded the effect on cost savings as well as improving the quality of the sample.

In terms of maximising the benefits of using the system of automated reminders, we have looked at a number of improvements such as implementing a shortened reminder script to bring call-length nearer the optimal 30 second message length, topping up all the undelivered AVMs by using post or other media such as e-mail, and piloting interactive telephone messages.

Following the positive Premier experience, AVMs have been trialled on other TGI surveys, specifically GB and Youth, with a view to fully replacing the current cycle of postal reminders. Results for the Youth trial have yielded an increase in response rates, albeit on a slightly lower level than Premier. The Youth survey has in fact other implications in terms of age and parental permission. For those respondents up to 15 years old we are obliged to direct the AVM to the parent of the respondent.

SMS text reminders

With the penetration of mobile phones amongst the UK population now in excess of 80%, the TGI team also felt that there was scope for testing SMS text messages for reminders. In the light of the fact that the BMRB Omnibus has been collecting mobile phone numbers since January 2007, the main GB TGI survey, which is placed on the back of the Omnibus, was chosen for the SMS reminders experiment.

An example of the SMS text was as follows:

Mr (variable text), your contribution to the National Buying Survey is important. Please return your completed book within 2 weeks.
www.bmrbrespondent.co.uk

There were some specific considerations for SMS reminders which are worth mentioning. SMS reminders present a space issue compared to AVMs or postcards as they are limited to 160 characters. Despite this the SMS was still personalised and the message included the main points we wanted to put across. It also provided us with flexibility in the despatch times, i.e. it gave us an opportunity to reach respondents at different times of the day, regardless of where they happened to be at the time. Other considerations included that not all respondents use SMS facilities on their mobile phone, or indeed have the same receptivity to this facility. However, we concluded that nowadays SMS are widely accepted as a mode of communication and importantly, were significantly less expensive than postal reminders. Moreover, the experiment would give us an ideal opportunity to learn more about our respondents as individuals and to assess the effects of different types of communication.

The trial involved replacing the first three postal reminders with SMS text reminders, whereas the fourth and last reminder was left as a formal personalised letter. This ensured that all respondents would receive at least one reminder. The experiment was run for 2 weeks and again response and weekly usable questionnaire returns were monitored as well as delivery of the SMS.

Results for the SMS test period unfortunately showed a decrease in response rates of approximately 4% compared to a standard week, when we would normally use postal reminders. This was somewhat disappointing but could feasibly be explained thus: respondents might have received the SMS reminders in all kinds of situations e.g. in a meeting, on a train, at home etc and they could have been quickly read and deleted or perhaps not even read at all, unlike letters or voice messages which are received at home, a place where, importantly, the questionnaire is usually to hand. Looking at the profile of respondents, it is no surprise that 15-24s were more responsive to SMS as they, of course, tend to favour this type of communication.
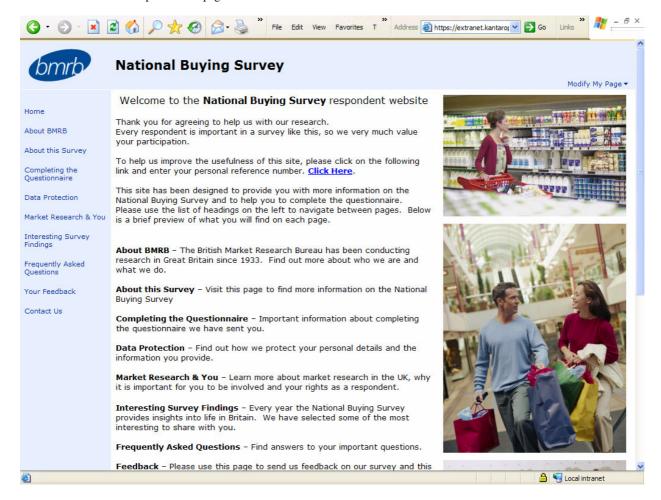
Further experiments will be done in order to assess how we can be more effective in targeting SMS reminders and to assess if this methodology can be used for at least part of the sample. Initial findings direct our thinking towards 15-24 year old respondents who are difficult to reach. Specifically, can we devise a process which uses different reminder methodologies, which will result in an increase in response rates as well as reduced costs?

Experimenting with new technologies in the reminder process has undoubtedly been an interesting and rewarding exercise. There is no doubt that we will continue to refine our processes, probably using a combination of old and new technologies. We have implemented automated voice messages as reminders in three TGI surveys, with the resultant increase in response rates and reduced costs. TGI currently uses a mixed methodology approach (AVM/Post) which, we believe, makes us more effective in reaching respondents and maximising response rates.

Informing the Respondent – A Respondent Website

The respondent is the most important asset in market research and as response rates drop each respondent becomes relatively more important. The growth of the Internet has enabled BMRB to provide more information to its respondents. To this end, TGI has set up a website specifically for respondents so they can learn more about the TGI surveys, as well as obtain additional industry information such as the Market Research Code of Conduct and the Data Protection Act. Armed with this data, respondents are in a position to make a more informed decision about completing the survey.

The website was launched in January 2007 and it contains specific information about GB TGI as well as other more general areas of interest. An example website page is shown below.

Having this interactive and dynamic interface with respondents creates benefits for both the respondent and BMRB. For respondents, they are more informed as they can select relevant information or use it as a mechanism to communicate with BMRB. For BMRB it raises the company's profile and that of its surveys, which one hopes will encourage respondent involvement.

Since its launch in January 2007, the number of visitors to the website has grown as we have refined the way we inform respondents through interviewers, questionnaires and reminders. Respondents are given a username and a password, so they can log in. Their interaction with the site tends to focus on reading about interesting findings from the TGI data and giving feedback on the survey or the actual website. The more difficult to reach respondents, such as male, social grade B, South and London seem to be the most likely visitors so far. It has also been noticed that the online questionnaire has increased traffic, as the number of visitors has doubled since its launch in August. Although there is a high relationship between visitors and usable questionnaires, it is yet to be established if the website can actively convert visits into usable questionnaires, i.e. is the website having the effect of engaging respondents more effectively.

There are several potential strands for future development for the respondent web site. Specifically, it could provide an access point to online TGI questionnaire, we could undertake short ad hoc questions online or it could act as a recruitment platform.

Conclusion

Technology is encroaching upon all aspects of the market research industry including readership surveys. This paper has

focussed on a few specific examples of how new technology is being used by BMRB on its TGI survey, namely in questionnaire delivery, on reminders and in providing information to the respondent. Technology can also, of course be applied to many other parts of the survey process for example in data delivery for clients via web portals, or in the use of electronic incentives and many others, which are too numerous to cover here. What is true is that technology can provide many benefits to the client and to the research company, whether in the form of increased revenue, reduced costs or simply providing a better value product.