

RESEARCH ● Survey says

CMOR finds survey refusal rate still rising

By STEVE JARVIS
Staff Writer

Like census takers on a bad day, market researchers are finding that the public still just isn't checking in despite efforts to boost participation.

Research industry executives, analysts and other experts have long lamented the rising tide of survey refusals. But despite a decade of off-and-on trade press and industry trade group attention to the issue, the research industry seems to have made little progress toward a solution. The latest statistics released in September 2001 by the Council for Marketing and Opinion Research (CMOR), a national nonprofit research industry trade group based in Cincinnati, confirm

that the industry still faces an upward trend in the number of people refusing to participate in surveys each year.

In the survey of over 3,700 U.S. consumers conducted in May 2001, nearly 45% said they had refused to participate in a survey over the past year, up from 40% in 1999 and 37% in 1995, the two previous years in which the CMOR study was conducted. (In 1992, the CMOR refusal rate was 31%, up from 15% in 1982.) CMOR's definition of a survey refusal does not include instances in which consumers use caller IDs or answering machines to avoid telephone calls from researchers—factors that would push the actual refusal rate much higher.

Jane Sheppard, director of respondent cooperation at CMOR, says no quick-and-easy answers exist to explain why the research industry is having such difficulty reversing the trend. But she says a basic part of the problem is that, "In our need to please clients, we'll do anything for them," even if clients want to, say, go forward with a telephone survey that is more than 20 minutes long or otherwise is likely to generate a large number of refusals.

A variety of other familiar explanations for the trend are offered by research executives this year, including: ongoing difficulty overcoming the public's concerns regarding data privacy protection; a negative association with telemarketing efforts of all stripes; consumers' aversion to telephone surveys and a lack of survey method choices for consumers; a need for better salaries for interviewers; and the fact that consumers receive no financial compensation for participating in most surveys.

The public's concern about privacy protection is one of the most significant image problems the marketing research industry must overcome if it is to reverse the trend toward more refusals, experts say; the problem has only gotten worse in recent years with the rise of the Internet and several much-publicized examples of unauthorized or fraudulent use of data available on it. For example, CMOR's 2001 report shows that only about 30% of respondents "agree" or "strongly agree" that researchers can be trusted to protect individuals' right to privacy, down from 40% in 1999 and 50% in 1995.

Nick Tortorello, president of Guideline Consulting, a division of New York-based Guideline Research Inc., says the research industry may eventually have to succumb to some sort of federal privacy regulation to help reverse the trend toward more refusals.

"I wouldn't like to see the federal government step in, but it may be necessary," he says, because research industry trade associations like CMOR can only regulate their own members.

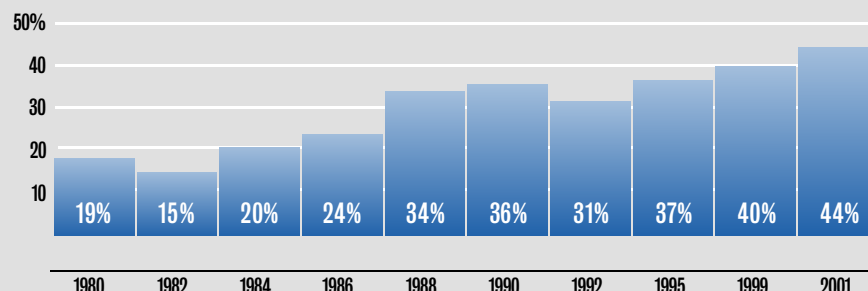
The trend toward more survey refusals in the past 10 years can also be linked to a rise in the volume of telemarketing throughout the decade, according to Sheppard.

"Back in the '90s, we started to see sharp increases in the number of survey refusals and that was during the time when telemarketing grew substantially," Sheppard says. Telemarketers have made so many sales calls over the years that they have blurred the line in consumers' minds between sales and surveys, and forced the research industry to get beyond consumers' perception that, "anyone calling is somehow trying to sell you something," Sheppard says.

No statistics are available to accurately track the total volume of outbound telemarketing calls made in the United States each year, but the New York-based Direct Marketing Association's "do not call" list counts some 4 million U.S. consumers who are looking to eliminate telemarketing calls to their homes. Still, any reduction in the total volume of outbound telemarketing calls appears to have done little to fix the damage done to the research industry. When the phone rings in a private home and the Caller ID displays "unknown caller," "people still immediately assume it's a telemarketer," Sheppard says.

CMOR did not break down refusals by sur-

Trend: Refused survey in past year*



* Refusals do not include use of caller ID and answering machines to avoid calls.

Source: Council for Marketing and Opinion Research, Cincinnati, Sept. 2001

vey method, but additional data from the group's 2001 study strongly suggest that the public's distaste for the telephone survey method is also one of the most significant factors behind the continued rise in the total number of survey refusals.

The most recent study clearly indicates that consumers prefer Internet and mail surveys vs. the telephone method. CMOR asked 1,753 U.S. consumers via the Internet what their first-choice survey method was, and a 78.9% majority chose "Internet" while only 3.2% chose "telephone." (CMOR also asked another 1,973 people the same question via telephone, and a 39.9% majority selected "mail" as their first-choice survey method, with "telephone" chosen by only 26%.)

Doug Zabor, CEO of Johnston, Zabor, McManus Inc., a research firm based in Research Triangle Park, N.C., suggests that telephone refusals could be curtailed if more research firms would offer randomly dialed consumers the choice to complete the survey by mail or Internet if they are uncomfortable being contacted on their home phone.

Sources agree researchers are limited in what more they can do to combat telephone survey refusals, but the familiar refrain of potential remedies includes: offering to call back at a more convenient time if a respondent initially refuses; being upfront about identifying the name of the research company (and client if possible); keeping interviews short; and stressing the fact that the interviewer is not selling anything.

Research professionals also acknowledge that their industry recognizes the need for more highly skilled and motivated interviewers to help reverse the refusal trend. "Everyone (in the research industry) is always con-

cerned about raising salaries for interviewers," Sheppard says. "That conversation has gone on for close to 30 years." But Sheppard says clients need to agree to help pick up the tab for higher interviewer salaries and that they are often not willing to do so—a familiar story and one that doesn't seem likely to change any time soon.

Another factor in the disconcerting trend toward more survey refusals is an unwillingness on the part of busy consumers to give up their limited free time at home to participate in surveys for no financial reward. Zabor says the practice of paying small courtesy fees, even just \$5 to \$10, to participants in consumer surveys must gain acceptance among researchers if they expect the research industry to reverse the trend toward more refusals.

"Paying 100% of the respondents (for their participation in a survey) needs to happen and will happen in the consumer research realm," Zabor says.

The idea's supporters point out that the research industry standard for pharmaceutical product prescription surveys among physicians is to pay the doctors for their time at a rate approximately equal to what they would charge their patients.

"If we do it (pay for survey participation) with professional groups, why not ordinary consumers?" Guideline Consulting's Tortorello asks.

But if the notion of shelling out more money to reduce survey refusal rates gives researchers and their clients a collective case of heartburn, they can take solace in knowing that the 2001 CMOR study wasn't all bad news. For example, the survey also showed that of the consumers polled by CMOR, a total of 77% reported they were either "fairly willing" or "very willing" to participate in future surveys, up from 71% in 1999, and comparable with the 78% of respondents who felt that way in 1995. ■

I wouldn't like to see the federal government step in, but it may be necessary.