BREI Surveys and Data Analysis: Views from a Data Collector and a Consumer

Tom Ilvento
Food and Resource Economics

Sign of the window in a survey office

- Speed
- Price
- Quality
- **Pick any two!**
There is no “Perfect” survey

- Conducting a survey is a series of compromises
- Things we might consider in a BR&E survey
  - Should we sample
  - How large a sample
  - Who should we survey
  - Fixed response versus open ended questions
  - What to ask?
  - How much detail
- I have not seen a perfect survey yet!!!
Another way to look at this

- As an applied statistician/methodologist, I was trained to focus on:
  - Sampling Error
  - Coverage and Nonresponse
  - Appropriate Analysis

- We ASSUME that everything else is taken care of in a professional manner

Sources of Error

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So how can we do better?

Tailored Design Method

The Tailored Design Method

Mail and Internet Surveys: The Tailored Design Method, 2nd Edition

Dillman, Don A. John Wiley & Sons, New York, 2000
**What is a Tailored Design Method?**

- Don Dillman first developed the **Total Design Method** for self-administered surveys.
- He revised this as the **Tailored Design Method**.
- **TDM** is a research-based set of strategies to maximize response and improve the quality of data in surveys.

**Tailored Design Method**

- The Tailored Design Method seeks to maximize the **quality** and **quantity** of data through a rigorous set of techniques.
- These techniques emphasize factors that enhance the exchange of information and improve the organizational process of the survey data collection.
- The approach is **systematic** and **research based**.
It is based on Exchange Theory

- We seek information from the respondent and this relationship involves an exchange.
- To get a quality response we must provide something in exchange that either:
  - encourages a response, or
  - limits anything that might discourage response

Tailored Design Method

- It involves:
  - Well constructed questions
  - Good visual design of the survey
  - Ease of filling out and returning the survey
  - Use of multiple contacts to improve response rate
  - Confidentiality
  - Emphasis on the importance of each response
  - Commitment to respond to issues
  - Incentives to respond
Think of the exchange in terms of rewards, costs, and trust

- **Rewards** include creating a feeling of importance for the response
  - treating the subject with respect
  - saying thank you
  - asking for advice
  - making the survey interesting
  - offering tangible rewards

Reducing costs to the respondent...

- Ways of reducing **costs** include:
  - avoiding question wording that creates anxiety or embarrassment
  - avoiding inconveniencing the respondent
  - making the questionnaire short and easy to read
  - minimizing unnecessary requests for personal information.
And a little trust...

- Ways of establishing trust involves
  - offering tokens of appreciation in advance
  - sponsorship by a legitimate authority
  - offering assurances of confidentiality.

Do these things apply to BR&E Surveys?

- Of course they do!
- The strategies recommended by BREI follow the Tailored Design Method
- Let’s look at our focus on
  - Rewards
  - Reducing Costs
  - Building Trust
How does this relate to BR&E Surveys?

- **Rewards**
  - Focus on existing industries
  - Geared to respond to business issues
  - Red Flags and Recommendations

- **Reducing Costs**
  - Face-to-face interviews
  - Well-designed survey
  - Skip-it rule

- **Trust**
  - Locally owned program
  - Confidentiality

One way we notice is in response rates

- Typically business survey response rates are dismal
- 10 to 20 percent response is not unusual
- A recent Bank customer satisfaction survey in Delaware resulted in 7% response rate!
- Dillman indicates that using his method results in 65% to 75% response rates for mail surveys
- BREI sponsored approaches result in 70% to 80% response rates!
**Five Key Elements to Get a High Response Rate (Dillman)**

- Respondent-friendly questionnaire
- Multiple contacts
- Return envelopes with real First-Class stamps (easy way to return)
- Personalization of correspondence
- Token prepaid financial incentives

**Why is the response rate so important?**

- Nonresponse is when people refuse or neglect to answer a survey -- rarely do we find 100% response
- If nonrespondents are not different from respondents we don’t have a problem, we just have a smaller sample
- But, studies show that respondents and nonrespondents are different
- When differences exist we have nonresponse bias
How Much Can Nonrespondents Change the Results?

- We can never be sure. It depends upon many factors.
- But, for a Yes/No type question, the maximum range of change of a nonrespondent group is equal to the nonresponse rate.
- For example, if only 20 percent respond, the true answer would have an 80% range.

Suppose we ask businesses whether they are interested in seminars on quality control.

Only 20% respond to the survey and the results are:
- 55% say Yes
- 45% say No

What if the 80% nonrespondents all would have answered Yes?
- 91% say Yes
- 9% say No

What if the 80% nonrespondents all would have answered No?
- 11% say Yes
- 89% say No
Critique of BR&E Surveys

- **Canada and Rendleman Critique**
  - The authors focused on the need for predictive data.
  - Their research found that 53% of questions dealt with information that is easily known.
  - Only 5.2% of questions looked at company intelligence.
  - Less than 1% focused on industry intelligence.

Critique of BR&E Surveys

- **Types of Questions**
  - Confirmation Questions
  - Assistance Questions
  - Problem Identification Questions
  - Predictive Questions
  - Industry Intelligence Questions
  - Company Intelligence Questions
  - Buyer/Superior Linkage Questions
Canada and Rendleman Suggest

- Seek out information relevant to the decision-making process of companies
- Create a process to transform unconnected pieces of information into relevant, accurate and useable strategic knowledge
- Focus information resources on helping identify marketing opportunities and predicting companies at risk

Suggestions by Canada & Rendleman

- Compile employer information ahead of time
- Visit or telephone interview with CEO
- Allow open-ended questions that probe further
- Use predictive information questions - learn about factors that drive behavior
- Use market research questions for your program - i.e., satisfaction
- Use a risk assessment approach - is the company likely to close, downsize, or reallocate?
- Blend the findings into a marketing plan.
A few tips for BR&E surveys

- Focus on the purpose of the survey
- Don’t reinvent the wheel
- Keep the respondent in mind
- Recognize the connection between the data collection and data analysis
- Conduct periodic evaluation

Focus on the purpose of the survey

- This is so simple it seems obvious
- But in the development of a survey it is easy to lose focus on the original purpose
- A good approach is “As much as you must, as little as you dare”
- Eliminate questions for things for which you do not have a local or regional response, or you don’t intend to use directly in your program
Goals of a BR&E Visitation Program

- Demonstrate to local businesses that the community appreciates their contribution to the economy
- Assist businesses in using programs aimed at helping them become more competitive
- Help existing businesses solve problems
- Develop strategic plans for long-range BR&E activities
- Build community capacity to sustain growth and development

Don’t reinvent the wheel

- Use the resources of other programs
- Examine the software programs that other programs have developed
- There is a wealth of examples of BR&E surveys
Keep the respondent in mind

- Whenever you are involved in a survey effort
- Try to put yourself in the shoes of the respondent
- Ask yourself
  - How would you feel about answering?
  - Do the questions place too great a burden on the respondent?
  - Are the questions realistic?

Recently I have been involved in three surveys as a participant

- The Current Population Survey from the U.S. Bureau of the Census
- Nielson Poll for television viewing
- U.S. Census
Current Population Survey

- One of the largest, best organized surveys in the world
- Every month 55,000 to 60,000 households are surveyed
- Detailed information on employment, income, poverty, migrations, demographics, and current issues
- They have a very high response rate - they are the government

I was thrilled to participate....
But I realized the difficulty in being accurate
And my wife didn’t take kindly to some of the questions
Did anyone here ever fill out the Neilson ratings survey?
- It is long and difficult
- It requires you to indicate in 15 minute time blocks
  - What you watched
  - Who you watched it with
  - The channel and program name
- Thank goodness I did it over The Thanksgiving break when we traveled!

This time it got very politicized!
- Different groups reacted to this survey more than any time in past history
- Somehow answering the census became mixed up with political and religious ideology
- And response rates suffered
All of these experiences got me thinking

- I believe surveys are an important tool
- But the way we do it is very important
  - The questions we ask
  - The expectations we have of the respondent
  - The respect we have for his or her time
  - The appreciation we show
- I also have a healthy skepticism for the quality of data, and how far I should go in making conclusions

Recognize the connection between the data collection and data analysis

- What you ask, and the response options you give the respondent, influences how you can analyze the data
- In most cases we are only using the data for
  - Frequencies - what percent answered
  - Crosstabs - breakdowns of frequencies for different groups
- Think about what you want to do with the data before you interview with your survey.
Conduct periodic evaluation of your survey

- I’m not advocating tinkering with the survey all time
- But surveys aren’t perfect
- And they should be revisited on a periodic basis

A copy of this presentation will be found on my web site

Thomas W. Ilvento
Chair, Food & Resource Economics
University of Delaware
213 Townsend Hall
Newark, DE 199717
Voice: 302-831-6773  Fax: 302-831-6243
E-mail: ilvento@udel.edu

http://www.udel.edu/FREC/ilvento/index.html