

Who Moved My Respondent?

January 2002 newsletter

Recent changes in technology that have caused dramatic changes in consumer's telephone usage patterns are not only making telephone interviewing more expensive, but also less accurate. Too often, we are **missing the very customers with whom we wish to speak.**

Telephone interviewing has come a long way since the 1936 Presidential survey that predicted the Republican candidate (Landon) would defeat the ultimate winner (Roosevelt). This poll exemplifies the perils of non-respondent bias in which the non-respondents (those without telephones who tended to be less wealthy and Democratic) differed significantly from the actual respondents (telephone owners who were wealthier and tended to vote Republican).

Census data puts telephone penetration at less than 40 percent in 1936, although by 1970 it had become almost universal (90+%), enabling researchers to practically eliminate the more expensive door-to-door methodology without introducing a significant level of bias.

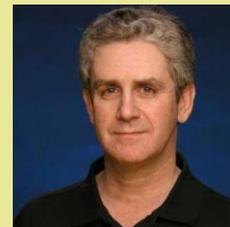
We are at a similar crossroads right now. While it is painfully obvious that respondents have become much harder to reach, it is the *cumulative* effect of new telephone technologies (see box at the right) that will make telephone interviewing increasingly problematic in the future. A particularly thorny issue will be the substitution of cellular phones for land lines.

By the end of 2000, 38 percent of all U.S. telephone lines were wireless (110M cellular and 188M land

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Brand Clarity is a process by which consumers reveal the essence of a brand to make sure that the products and services being offered are closely aligned to their needs.



lines). In the past two years, the number of wireless lines has increased by about 50 percent, while the number of land lines appears to have decreased, making nearly half of all phone lines wireless.

As prices of cell phones meet the cost of fixed lines, more people will choose wireless phones - not only for the lower cost, but because of their convenience and other value-added features. And those who deselect land lines tend to be more active, younger and wealthier - exactly the types of consumers that businesses want to reach.

We have come full-circle with non-respondent bias and telephone interviewing. In the not-too-distant future, a random sample of land-based telephone numbers will not be very representative of any desired population and our connection to the customer will be endangered.

CHANGES IN TECHNOLOGY THAT AFFECT THE COOPERATION RATE OF RESPONDENTS

- **Answering machines and voice mail** provide a low-cost method for respondents to screen out unwanted calls.
- **Unlisted telephone numbers** (because of mobility or privacy concerns) exclude many potential respondents from listed samples.
- The **usage of modems** (and to a lesser extent fax machines) tie up residential telephone lines, producing more busy signals.
- **Caller ID displays** that give respondents an opportunity to avoid answering the phone when the caller's number is not recognized.
- **"Do No Call" lists**, while not directly affecting survey telephone centers, enhance the environment of suspicion about calls received at home.
- Newer technologies introduced by the RBOCs, such

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as **Call Blocking and Privacy Manager**, that give telephone users more tools to avoid calls.

- The **substituting a cellular telephone** for a fixed land line, eliminating a household from being contacted by any current telephone methodology.

