

# But It LOOKS Like Real Data...!

## The Problems With Combining Telephone and Online Survey Data In Market Research

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We are in the midst of a revolution. The Internet is changing everything: how we work, how we find out what's happening in the world, how we shop, how we stay in touch with friends and family, and how businesses hear from and respond to their customers.

With more and more households using cell phones and call screening, it's getting harder and harder to conduct survey research by telephone. Many organizations are flocking to online surveys to fill the gap. On the surface, it's easy to see why: online surveys are cheap, fast, and relatively simple to put online. If they sound too good to be true, that's because, to some extent, they are. Cheap, fast, easy: definitely. But scientifically valid? That's where the online survey methodology can't quite compete yet.

Panel-based online surveys are not an appropriate methodology for surveys of the general population. The reason is that panel-based online surveys do not allow for probability sampling. Not everyone in your target population has an equal opportunity to participate in an online survey and, more importantly, even if we assumed universal Internet use, there's no system currently in place for randomly selecting from the pool of all Internet users. No system or software yet exists to randomly generate email addresses the way researchers can randomly generate telephone numbers within a specific area code. We have no way of knowing even if "mycustomer@zmail.com" lives within a company's market area, or across the country.

Since no method yet exists to survey the general population online, companies must turn to online panels: that is, a group of consumers who have agreed to be contacted for market research studies in exchange for cash rewards and incentives. Like Internet users in general, panelists skew younger, better-educated and more affluent. Panelists are often recruited through partnerships with airlines and frequent flier lists, creating a unique respondent type: not only younger, better-educated, and more affluent than the general population, but more likely to fit the profile of a "road warrior" as well.

Most companies know that panelists are not representative of the general population, so many have begun employing ad hoc multi-modality solutions: they conduct a panel-based online survey because they can get lots of respondents quickly. Since online surveys skew younger, better-educated and more affluent, they do a telephone survey as well, with the idea that the telephone survey will capture the older, less well-educated and less affluent residents.

So far, so good. But there are two fundamental problems with this approach: (1) you can't combine a scientific sample and a non-scientific sample and come out with scientific data; and (2) even after weighting the data to reflect the characteristics of the population, clear attitudinal differences between online and phone survey respondents remain.

First, it is not possible to combine a scientific probability sample (i.e., a random digit dial telephone survey) with an unscientific convenience sample (i.e., an online survey) and come up with scientific data. The data you get from a study like this will look like real data... but how much can organizations trust such a study for the types of decisions they need to make?

Scientific samples have known margins of error that tell us the extent to which the data collected reflects what we can expect from the total population: the smaller the margin of error, the more we know can trust our data. For example, say you conduct a representative telephone survey of 300 residents. With this sample, you will have a known error rate of plus or minus 3.4 to 5.7 percentage points. If 90% of your survey respondents tell you they prefer Service Concept A over Service Concept B, you can proceed with confidence knowing that the vast majority of the total population is likely to prefer Service Concept A.

With an online survey, you have no way of knowing the extent to which your data reflects the attitudes of the total population. In fact, the only thing we know for sure is that online surveys do NOT accurately reflect the attitudes of the total population. Which brings us to the second problem with combining online and telephone methodologies: even after you weight the data, online survey respondents have very different attitudes compared with telephone survey respondents.

Weighting is a common statistical procedure that adjusts the data collected through surveys to better reflect the characteristics of the population. For example, since online surveys skew younger, more affluent, and better educated, you could weight this data to place more emphasis on the responses of older, less affluent, less educated online respondents.

However, study after study has shown that even after researchers apply weights to online and telephone survey data so that they reflect the characteristics of the general population, clear attitudinal differences remain between the two respondent types. For example, in a study we conducted in partnership with Massachusetts General Hospital about residents' image and awareness of area hospitals, we found that even after weighting, online survey respondents exhibited a much stronger orientation toward academic medical centers. By contrast, telephone survey respondents were more likely to be aware of and express a preference for community hospitals. A hospital that had relied solely on weighted online survey results would have had a dramatically skewed understanding of the market position of academic medical centers in New England.

So what's a researcher to do? There is no perfect solution to the problem at this time. This is not the first time in its history that market research has been faced with major change in the way it collects consumer data. It wasn't that long ago that telephone surveys constituted a major innovation: mail surveys and before that, door-to-door interviews, have previously been considered the gold standard for representative survey research.

It is almost a foregone conclusion that online surveys will be the methodology of choice for survey research in the future. Even today, online surveys are a wonderful choice for certain types of research: for example, if you want to conduct an employee satisfaction study, you

probably have email addresses for every employee. An online survey would be a perfect choice in this case: you have access to your entire population and all of your employees will have an equal opportunity to participate.

Internet use will almost certainly achieve the degree of universality the telephone has achieved. Online surveys will only truly become a viable means of obtaining representative consumer data, however, if the Internet undergoes a change like that of the telephone system in the mid-twentieth century, which established a nationwide system of seven digits tied to a geographic location.

Until that day, businesses are advised to take caution in choosing a methodology for representative survey research. Companies who elect to use multi-mode solutions should be prepared to interpret this data with considerable caution. Multi-mode surveys will give you what looks like real, quantitative data, but it is not a scientific sample and should not be collected with the intention of extrapolating the findings to the general population. With these limitations in mind, companies may get useful insights from online surveys, but would be better served thinking of online surveys as having more in common with qualitative research - focus groups, online bulletin boards, and in-depth interviews - than with traditional quantitative research.

# ABOUT MARKET STREET RESEARCH

## Company Overview

Market Street Research is a marketing research company with over 30 years experience conducting customized, premium-quality marketing research services and political polling for hundreds of consumer products companies, hospitals, banks, nonprofits, and other businesses and organizations throughout the United States.

We specialize in understanding our clients' needs and delivering high-quality market information for effective business and organizational decisions. Market Street Research is a women-owned, vibrant, dedicated, client-oriented business with a long history of commitment to our clients, our employees, and our community. Market Street Research has been awarded the official recognition as one of the **Top 50 Diversity-owned businesses of Massachusetts in 2006-2010** by DiversityBusiness.com.



## Description of Services

Market Street Research provides a full range of qualitative and quantitative research services, including:

- ▶ Online Surveys
- ▶ Telephone Surveys
- ▶ Mailed, Paper Surveys and Intercepts
- ▶ Traditional, In-Person Focus Groups
- ▶ Online focus Groups, including:
  - Social Networking-Powered, Bulletin Board-Style Groups
  - Chat-Style Groups with Advanced Graphical Feedback and Capture Capabilities
- ▶ In-depth and One-on-One Interviews
- ▶ Case Studies and Literature Reviews
- ▶ Secondary Source Data Analysis and Synthesis



## Market Street Research's Clients

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Among our [clients](#) are:

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- ▶ **Pharmaceutical, Medical Device and Technology Companies**, including Pfizer, Boston Scientific, Avid, VCI and mPhase Technologies.
- ▶ **Banks, Credit Unions and Other Financial Institutions** including Citizens Bank, Liberty Bank, Andrews Federal Credit Union, DanversBank, Wells River Savings Bank, First Niagara, Farmington Savings, Berkshire Bank, and Enterprise Bank and Trust
- ▶ **Insurance companies**, including Blue Cross Blue Shield of Massachusetts;
- ▶ **Educational Institutions** such as, Smith College, Mount Holyoke College Brandeis University, Deerfield Academy, and Loomis Chaffee.
- ▶ **Media giants**, such as The Weather Channel, ABC TV and The Children's Television Workshop.
- ▶ **A wide variety of other organizations**, including manufacturers like Spirol International and Fortune 100 consumer products companies like Sara Lee.

## Studies Performed

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At MSR, our mission is to provide the highest quality customized research and analysis services designed to provide information, insight and direction for decision-making to enable our clients in achieving extraordinary results. Toward this goal, some of the types of studies we conduct for our clients include:

- ▶ **Consumer Image, Awareness and Preference Studies**
- ▶ **Market Potential Assessments**
- ▶ **Current and Potential Referring Physician Studies**
- ▶ **Community Health Needs Assessments**
- ▶ **Branding and Positioning Research**
- ▶ **Market Segmentation Studies**
- ▶ **Materials Testing**
- ▶ **Customer, Employee and Patient Satisfaction Studies**
- ▶ **Satellite Location Studies**
- ▶ **Feasibility Studies**

## A SAMPLE OF OUR CLIENTS



*"The MSR team listened extremely well to what our needs were and what decisions we were looking to make. They understood our problems and knew the issues we faced. The research reinforced a lot of things we already knew about our reputation and brand. But more importantly, we learned new things about how the public viewed our organization and our competitors that surprised us. The research MSR conducted provided us with a new understanding that, in turn, helped to direct and drive our strategies and decision-making."*

*~David Polk, V.P. Marketing and Business Development, Hartford Hospital*

We look forward to helping you.

## Contact Us

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For more information on who we are, what we do, who we do it for, and how we can help you, please contact:

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