Business Survey Communication Practices

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Of: Inquiry on business survey communication practiced
Overview of results
Torres van Grinsven, mevr. drs V., 23/04/2015
Overview

• Brief introduction:
  - What is Business Survey Communication?
  - It’s relevance?

• Overview of practices

• **Thank you for sharing your practices!**
• Thanks to Vanessa, who did most of the work; and to Taeke and Barteld for their assistance.
• Responses: 19 (response rate | eligible units (30): 63%)

We used:
• Introduction of the inquiry + cover mail
• One reminder (which helped)
What worked for our inquiry

- Reminder
- Your interest in your topic
- Incentive: our promise of you getting feedback in the results

- The inquiry has the characteristics of a business surveys
- Also regarding it’s communication
All communication with businesses selected for a survey, except for the communication within a questionnaire.

**Ultimate objective:**
- To get response: timely, accurate and complete

A Survey Communication Strategy is effective when this is achieved, within **constraints**!
A Business Survey Communication Strategy is...

“A **tailored** and **persuasive strategy** that communicates:
- the survey request,
- related instructions and procedures, and
- motivates and facilitates participants to comply with the survey request.

To activate this role the survey communication strategy should be an **objective-driven** and **coherent plan of communication measures, activities and actions.**”

**Holistic approach:**
This involves many communication materials and activities with a lot of staff involved for various stages in **the communication process.**

It is the job of the survey communication designer to organize this in such a way that the strategy is effective.

➢ **This is a lot of work!**
The relevance of Survey Communication

Let’s go back to 2012:

1st UNECE Workshop in Statistical Data Collection: “New Frontiers on Statistical Data Collection”
A shift in the balance of power

- Traditionally – data collectors in control
  - Responding to survey was seen as a duty – not any more
  - The change can be seen clearly by studying the attitude of respondents in different age groups
- Business organisations focus more on production and competitiveness
- The means of communicating are changing
- Respondents are getting harder to reach, and can control who they want to be reached by

**Conclusion:**
We need to adapt to respondents more and more in order to get their cooperation using all kinds of comm. means.
A shift in the balance of power

One of you said:

“The ... survey collects critically important data ... to inform sound ... policy decisions. Response rates for these and other surveys have been declining over the years for a number of reasons.”

One important reason mentioned is a change in the context for conducting the survey.
So, we need to adapt and tailor our communication strategy.
Survey Communication: part of survey design

Designing a business survey, includes:

- Planning the survey
- Sample design + estimation
- Mode selection +
- Questionnaire communication design
- Business Survey Communication
- Data collection
- Data capture, coding and cleaning
- Estimation
- Dissemination
- Archiving

Also ‘survey communication’
- often forgotten as a crucial element of the survey design!
- often asked: “How do I get response?” “How do I do that?”

The answer is Communication.
Research questions:

- **Practices:**
  What kind of communication practices are used as response enhancing techniques at statistical agencies that conduct business surveys?

- **Monitoring:**
  Is the strategy monitored with regard to effectiveness (of achieving the goals), costs, and effect on (perceived) response burden?

- **Metrics:**
  And, if so, what indicators/metrics are used?

- **Design:**
  How is the strategy designed? Is there a plan?
Results of Inquiry: preliminary

**General conclusions:**

- Long list of communication practices
- Shirt list of monitoring practices
- Diversity across agencies:
  - Practices vary from basics to an advanced communication strategy, including all kinds of means
  - In general not much monitoring is done, with exception of a small number of agencies
- Noting about costs!
Overarching practices

- Websites/portals with
  - information on the survey
  - FAQs
  - Survey calendar
  - Results of previous survey
- Ombudsman/response advocate
- Branding of agency
Pre-field practices

- Pre-notifications of survey to businesses
- Promotion of the survey, e.g. press releases
- Information campaigns in cooperation with industry associations, local authorities
- Getting endorsement and support from industry associations
- Updating contact information
- Checking eligibility, profiling and identifying crucial units
- Feasability studies
- Pre-testing of materials
- Planning key dates
- Training of staff
- Governance measures to reduce burden
Field practices

• Invitation / cover letter or email with more / less information about the survey
• Flyers, folders, leaflets
• Professional and technical support:
  - Website, on-line help
  - Helpdesk with support by phone
• Centralized collection portal
• Special attention to key businesses:
  - Courtesy calls
• Non-response follow-up:
  - Reminder letters,
  - Phone calls
• “Thank you” note
Field practices (cont.)

• Large business managers
• Association endorsement letters and industry specific fact sheets
• Send SMS/text message as reminder
• Reminder with interesting data
• Free consultations for respondents at regional offices
• Logging of all calls and contacts in a business provider information system
Post-field practices

• Enforcement: warning messages of financial penalties
• Recontacts for data validation of data, mostly by phone
• Feedback to respondents:
  - Customized output for respondents
  - Publication of collected data & notification of respondents
  - Benchmarking
• New Year greeting card with interesting statistical information
Monitoring

- Response rates: unit levels and weighted rates
- Imputation rates
- Survey management system
- Active collection management strategy using quality indicators and impact scores, to prioritize units for non-response follow-up
- Applying PDCA-cycle: discussing final metrics and plan refinements for future cycles
- Non-response analysis
What works

Effecting survey participation and response behaviour in business surveys is very complex. Many factors affect this process, among them:

• **Past response behaviour**: investing in a relationship with businesses from the very first contact
• **Incorrect information about units**: updating contact information and eligibility
• **Mandatory survey**: but this also means that we should do our best to facilitate businesses in accomplishing their task
• **Trust in survey organisation**: establishing trust by branding, endorsement, personalisation, confidentiality, non-response follow-up
• **Relevance for businesses**: What is in it for me? Relevance of survey topic, providing relevant feedback
• **Perceived workload (burden)**: pre-notifications, mode of data collection
Survey communication is an essential part of the survey.

To design an effective strategy we need:
• To know what we are doing:
  - Study response processes in businesses
  - Document and share current practices
• More experiments and effect studies before implementing (Boone/Walker presentation yesterday)
• Systematic monitoring: study the effectiveness and costs of applied strategies

In order to improve:
• Apply PDCA-cycle: Plan-Do-Evaluate-Adjust
“Not just sit and wait, and see what happens. By monitoring your processes you can see whether you’re on track, and whether you need to make adjustments. Communication with your staff and clients is essential.”
Thank you

• Questions?
• Question to you: Do you object to writing and publishing a paper on this overview? If so, please, let me know.

References
• IGEN (Interagency Group on Establishment Nonresponse), 1998.