

The

RESEARCH  
CORNER

A Newsletter about Custom Public Opinion Research (POR)  
in the Government of Canada

# FOLLOW-UP ON CELL ONLY HOUSEHOLDS

## A GROWING CONCERN FOR TELEPHONE SURVEYS

By Don Ambrose, Derrick Gray and Gary Halpenny

*This article was originally published in the January 2008 issue of Vue magazine, the magazine of the Marketing Research and Intelligence Association.*

The MRIA Response Rate Committee published an article comparing the incidence rate of cell-phone only households in Canada and the United States in the April 2007 issue of *Vue*.<sup>1</sup> The article had two main objectives. One was to report on penetration levels in both countries up to the end of 2005. The other was to indicate that there may be a way to deal with this potentially growing phenomenon by the use of weighting.

In that article, we reported that preliminary studies conducted by Field Research in California, have suggested that households that were *temporarily* cell-only in the past may be quite similar in demographic make-up to current cell only households. This led the committee to the hypothesis that if this finding were to hold true in Canada, it might offer a statistical means to compensate for the exclusion of cell-only households in random digit dialing (RDD) surveys by differentially weighting households which were found to be *recently* exclusively cell phone users.

The Response Rate Committee decided that it was important to investigate this issue further to determine if there might be any validity to this hypothesis in the Canadian market. Accordingly, MRIA commissioned Statistics Canada to add a question about recent cell-only use to the December 2006 wave of the Residential Telephone Service Survey (RTSS). Sincere thanks and appreciation go to BBM Canada and to NADbank for their financial support of this initiative.

Two key items of interest have arisen from that study:

1. The level of cell-phone only households in Canada may have plateaued in recent months.
2. There is almost no demographic similarity between current cell-phone-only households and recent cell-only households.<sup>2</sup>

1 Ambrose, D. and Gray, D., Cell-only households – A growing concern for telephone surveys. *Vue* magazine, April 2007, PP 20 – 21.

2 Two-way Chi-Square Test with confidence of +/- 0.05.

*continued on page 2*

### DID YOU KNOW



**The ESOMAR World Congress is in Montreal, Quebec, Canada  
September 22 to 25, 2008**

ESOMAR is the world organization for enabling better research into markets, consumers and societies. With 4,500 members in 100 countries, ESOMAR's aim is to promote the value of market and opinion research in illuminating real issues and bringing about effective decision-making.

[www.esomar.org/index.php/Congress08-overview.html](http://www.esomar.org/index.php/Congress08-overview.html)

### POLLS FOR THE PUBLIC GOOD

#### The World Association for Public Opinion Research

The World Association for Public Opinion Research (WAPOR) will hold its annual conference May 13-15, 2008 in New Orleans, Louisiana, USA, in conjunction with the annual meeting of the American Association for Public Opinion Research (AAPOR). This year's conference theme is "Polls for the Public Good."

[www.unl.edu/wapor/](http://www.unl.edu/wapor/)



## Cell-phone only levels in Canada

In the previous article, the authors suggested that if current trends continued, we could expect to see levels around 7% in December 2006 and even 10% in December 2007.

However, the December 2006 RTSS reported the incidence rate of cell-phone only households to be 5% in Canada. This seems to have leveled the trend we have observed to date. Oddly enough, the incidence rate of cell-phone only households in the United States continues to increase with Mediamark Research Inc. reporting an incidence of 14.0% of households for the field period of September 2006 to April 2007.

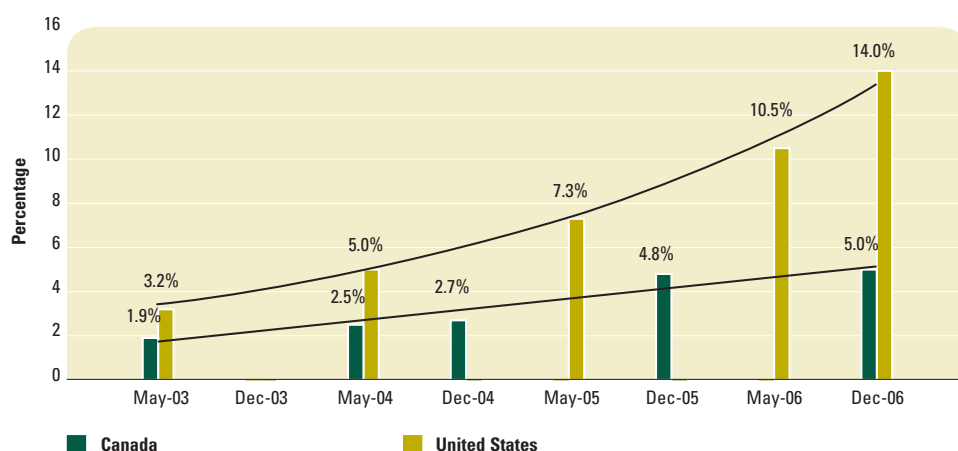
It should be noted, however, that the RTSS questionnaire was changed by Statistics Canada in 2006. In previous RTSS studies, respondents initially reported all phone numbers in a household. Respondents then were specifically asked whether any or all of them were cell phones. In the 2006 study, Statistics Canada began by specifically asking for "land line" phones and then asking separately for cell-phones.

When queried, Statistics Canada suggested that the perhaps surprising leveling off of cell-phone-only penetration may be due to:

1. the use of phone services offered by cable companies and voice over Internet Protocol (VoIP) may have given consumers more appealing alternatives to traditional landline service and reduced the drive towards cell-phone only; and/or
2. a subtle impact due to the change in the questionnaire.

## Percent of Households with Cell-only Service

Sources: Centre for Disease Control and Prevention: National Health Interview Survey (NHIS), Mediamark Research Inc., and Statistics Canada: Residential Telephone Service Survey (RTSS).



Given that incidence continues to grow in the United States, it might be assumed that some cell-only users incorrectly answered YES to Q1 and therefore were excluded from the cell-phone only count. Alternatively, it could add further argument to the proposition that the cell-phone only phenomenon in Canada is very different than that in the United States. It may even suggest that observations made in our neighbouring country do not, or will not, apply to our landscape.

The 2007 RTSS study<sup>3</sup> should allow us to determine which of these possibilities is more likely to be true.

## Relation between cell-phone only households and recently cell-only households

As noted previously, Field Research in California suggested that there may be similarities between households which were temporarily cell-phone only and households which are cell-phone only in the United States.

Based on the results from our custom question in the RTSS, it would seem that these similarities do not exist in Canada since the distribution within each measured variable differed with a certainty of 95%. In fact, many of the key household drivers in cell-only households are not prevalent at all among recent cell-only households.

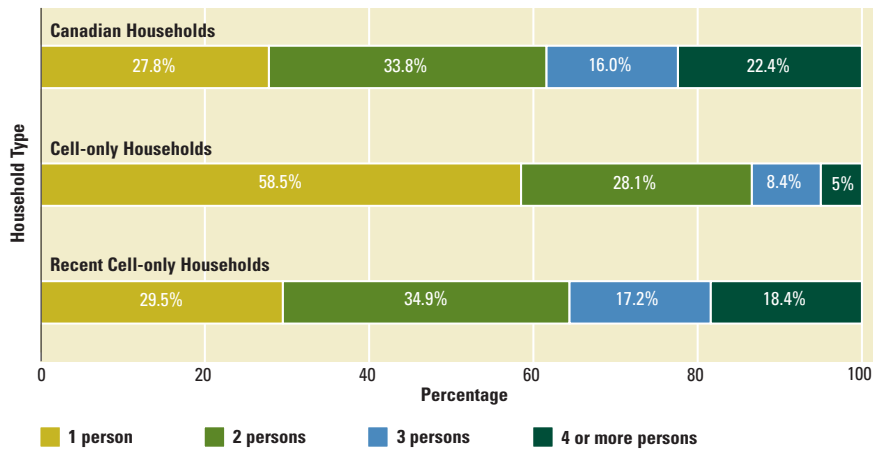
Cell-only households tend to be unattached, single person, households living in apartments. This is not the case within the recent cell-phone only group, which tends to closely parallel the general Canadian Household Population.

## Other findings of interest

In the April article we reported that regionally, cell-only use is most prevalent in B.C., followed by Alberta. The December RTSS now shows cell-only use being most prevalent in Alberta, with British Columbia, Manitoba and Quebec penetration rates being similar. This is further evidence that cell-only use may be greatly influenced by cell-phone company promotions.

## Distribution of Household Size

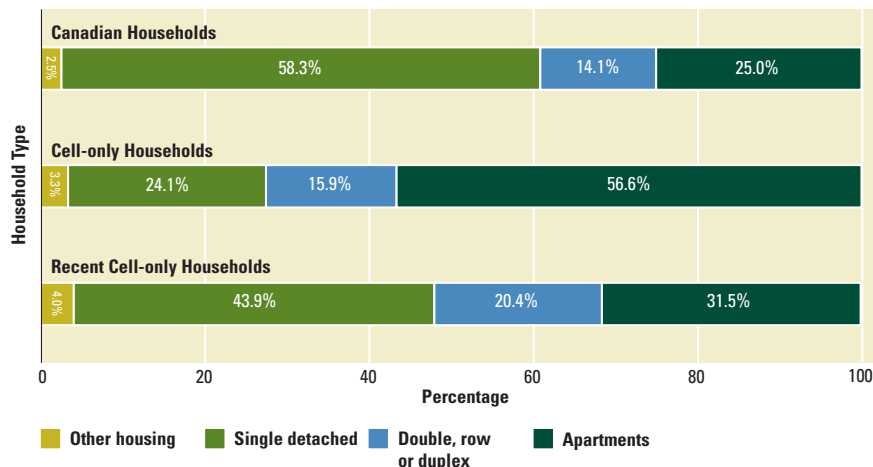
Source: Statistics Canada: Residential Telephone Service Survey (RTSS).



◀ These charts are just three examples of differences between household types. The same differences exist in most of the other measured variables indicating that there is no correlation between Cell-only households and recent Cell-only households. This leads us to hypothesize that this is a product of lifestyle and/or life stage changes that not only change the make-up of the household, but also have a strong impact on the likelihood that the household will remain cell-phone only.

## Distribution of Type of Dwelling

Source: Statistics Canada: Residential Telephone Service Survey (RTSS).



### More detailed data available

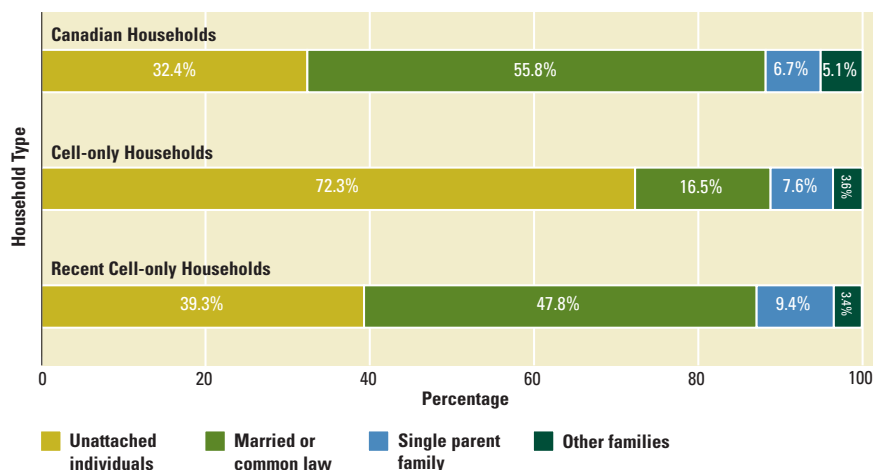
A set of detailed tabulations covering all demographic variables for cell only households is available to interested MRIA members. Please contact one of the authors to receive a copy of these tables.

### About the RTSS

Statistics Canada's monthly Labour Force Survey (LFS) includes the Retail Telephone Services Survey in a special issue of its December wave each year. The LFS is a highly rigorous national probability survey utilizing both telephone and in-person methodologies consisting of over 50,000 completed interviews per month.

## Distribution of Type of Economic Family

Source: Statistics Canada: Residential Telephone Service Survey (RTSS).



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## THE RESEARCH CORNER

*The Research Corner* is produced by the Public Opinion Research Directorate, Consulting, Information & Shared Services Branch of PWGSC for the public opinion research community in the Government of Canada. It provides information about custom research projects, offers ideas and information about research developments, and provides a forum for the exchange of experiences and best practices.

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The Directorate has valuable resources available in either hard copy or on-line at [www.pwgsc.gc.ca/por/text/index-e.html](http://www.pwgsc.gc.ca/por/text/index-e.html)

- Public Opinion Research in the Government of Canada: An Orientation Guide
- Annual Reports
- Research Techniques: Guideposts to Value
- The advisory Panel on Telephone Public Opinion Survey Quality
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# PROJECTIVE TECHNIQUES IN ONLINE SURVEYS – BRAND CANADA

By Mike Gadd, President, the ideas research group

Like any field of research, marketing research has its challenges. The main problems associated with quantitative marketing research are issues of accuracy, the lack of depth, its rational orientation and simplicity in the questioning process.

Likewise, there are issues with qualitative research (such as focus groups). Qualitative research lacks robustness of sample and so may poorly reflect the population at large. Both qualitative and quantitative research are plagued with declining response rates. Hybrid quantitative qualitative research designs can improve accuracy because there is robustness on the one hand and in-depth relevant probing on the other.

Many qualitative researchers use projective techniques founded in clinical psychology to dig deep to discover insights into relationships. We have taken these traditional projective techniques and adapted them to an online environment for our quantitative surveys. Examples of such techniques include sentence completion, photo sorts, and brand personality attributes. The research stimuli we choose to use are dependent on the unique brand. This method is applicable to all forms of research, public and private.

The ideas research group company is currently completing a series of Brand Nation studies to better understand the international markets and to demonstrate our projective techniques. Our first study completed was Brand Canada; Brand USA is currently under way.

The Brand Canada study involved two phases. The first phase required 20 adults and 10 teens to complete online photo diaries over the course of a week. They were instructed to search for

and/or e-mail in photos of scanned images that best represented their feelings towards being Canadian/ Canada, as well as the reasons behind their selections. The information obtained was then used to help ideate the quantitative research questionnaire design.

The second phase involved an e-panel online survey of the questionnaire among 1,000 adults and 200 teens. The engaging questionnaire featured many online projective techniques such as a brand (country flag) sort, brand temperature (using a virtual thermometer), a respect scale, photo sorts of emotional cues, famous Canadians that/who might best represent what being Canadian is about, and sentence completion.

We set interlocking quotas by region, respondent age and gender to examine the profile of the sample obtained. As a result of the under representation of people over the age of 60, we applied weighting factors according to Statistics Canada.

Since our research focuses on the relationship with a brand, and how to improve it, brand temperature has become our dependent variable. We have found from other research that brand temperature goes beyond brand usage; certain segments of society may feel they get locked into a brand, such as a financial services brand, but do not necessarily love using it. Brand temperature measures brand love – the relationship that people have with a brand.

The overall brand temperature for Brand Canada is extremely positive; the mean average temperature out of 100 is 85 and the median 90. Thirty four percent (34%) of the total sample indicated 100 out of 100. Brand Canada temperature is higher than average in the Atlantic Provinces and in Ontario outside Toronto. It is lowest in Quebec, followed by Alberta. Temperatures peak among Baby Boomers and are lowest among teens. Interestingly, there is no brand temperature difference by gender.

*continued on page 6*



# ETHNIC AND MULTI-LANGUAGE RESEARCH IN CANADA

## Summary of a Recent Presentation Given to the Government of Canada Public Opinion Research Community

By Mike Colledge, Senior Vice-President and Managing Director, Ipsos Reid Public Affairs

One of the most significant changes facing the public opinion research industry today is an increased demand for multi-language and multi-ethnic research.

We've seen this as an international research issue for many years now as large, multi-national companies increasingly look to research firms that can both collect comparable data in many languages around the world and provide the "in country" context necessary to understand what it all means for them and their industries.

More recently, this has also become a concern for clients who need to understand an increasingly multi-ethnic, multi-lingual domestic market. Immigration will fuel population growth over the next ten years. According to the most recent demographic projections, some 8.5 million new Canadians will come to Canada in the next decade, mostly from China, India, Philippines, Pakistan and South Korea. It is a business opportunity to understand these new arrivals – and a challenge for public sector organizations.

The research challenges are about more than dealing with different languages, the sheer numbers of immigrants and how this might affect a sampling frame or add costs for increased translation. The context of immigration has changed fundamentally: the low cost of international travel, the Internet and the traditional tight-knit enclaves in large city centres combine to allow today's immigrants to retain home country cultures, languages and attitudes as never before. Where I might view the recent elections in Pakistan or the advent of Kosovo's independence as interesting international issues, Canadian immigrants may respond to these events with an intimate, immediate and active engagement that is of equal or greater intensity than to the domestic issues surrounding them.

### What does this all mean for private and public sector organizations?

- The growth in immigration means a substantial opportunity for Canadian businesses. And because of the changes in the context of immigration these businesses are now realizing that they require a better understanding of how to reach and talk to these markets.
- It raises some interesting challenges for the public sector. If these groups don't fully participate in Canadian society and Canadian institutions where will the next generation of blood donors come from? Where will we find the police officers, doctors, and nurses we need to serve these new communities? How will these immigrants see the value of participating in government (either by voting or paying taxes) if they don't see the services or they don't see how their views and needs are being reflected in the policy and program development process.

### So, what is our response as researchers?

We have to understand that these new immigrants aren't as likely to respond to traditional methodologies and if they do, we have to avoid the easy analysis of netting what could be very disparate views into one category called "immigrants" to analyze the views of many.

Finally, we need to build the capacity to do more than translate from one language to another. Similar to the way we rely on our international network to provide real context and understanding of the issues we have to develop a domestic network of staff and sub-contractors that have the ability to provide context, translate culture and truly understand these different communities.

Mike Colledge and Will Daley of Ipsos-Reid Public Affairs made a presentation on this topic to a group of Government of Canada public opinion researchers on January 29, 2008.

## DID YOU KNOW



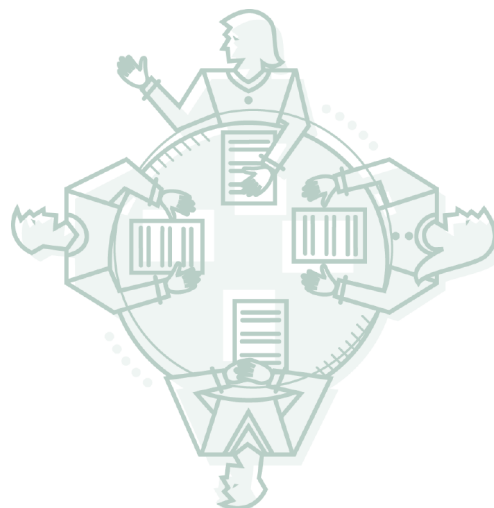
### Statistics Canada's 24th International Methodology Symposium

"Data Collection: Challenges, Achievements and New Directions" will take place at the Palais des Congrès in Gatineau, Quebec (5 minutes from downtown Ottawa) from October 28 to October 31, 2008.

This international event addresses statistical methodology issues relevant to the work of both private and public statistical agencies, and will bring together members of the data collection community including those from private, government, university and other research organizations.

This symposium will focus on issues related to challenges, achievements and new directions in data collection including planning, cost, implementation and efficiency. The first day will consist of workshops, while the following days will consist of both plenary and multiple streams of parallel sessions covering a variety of topics. Additional research and results will be presented via poster sessions.

[www.statcan.ca/english/conferences/symposium2008/index.htm](http://www.statcan.ca/english/conferences/symposium2008/index.htm)



**Spokesperson Summary**



"David Suzuki has dedicated his life to preserving this country. He has spoken not only about the environment but about the country as a whole. He opened the eyes of generations to the beauty and wonder this country has to offer. He has offered many solutions"

"David has the best interests of the country at heart...he loves the environment, deals with the issues at hand and makes recommendations for the future...he believes in and cares about Canada."

*ideas*

Q26. Imagine you had to choose one spokesperson you think best reflects everything Canada stands for.

Asked what they would say to a friend or relative outside Canada what they most like being about Canadian, respondents spoke first of freedom (of self expression, choice, movement, religion, education), love of land and diversity. This was an interesting finding, considering notions of freedom have been typically associated with the USA and its brand. The sense of freedom held by Canadians may simply reflect switches in global sensibilities and positions since 9/11.

The number one dislike expressed about being Canadian is "nothing". Some spoke of the cold weather (when surveyed in September and October), high taxes, too close an alignment with the USA, not having a sufficient Canadian identity and issues they had with multiculturalism.

For the photo sort we observed a difference by gender. Although both genders chose the Canadian flag and the mountains as their top two images, the third and fourth place choices of men and women were different. Men chose the hockey picture as the third most preferred image, possibly owing to the personalization and internalization with the photo. Some of the comments included "fond memories", "OUR sport", "strong heritage" and "love the game". Men ranked the multicultural hands picture in fourth place, giving objective and impersonal reasons such as "diversity" and "nationalities".

Women ranked the multicultural hands picture in third place, citing reasons such as "friendship", "inclusiveness", "helping", and "welcoming" while they ranked the hockey picture in fourth place, citing factors such as "popular sport" and "Canadians love it".

The photos sort exercise assists in determining the emotional drives to a brand that a company or government organization can then utilize to improve the brand relationship.

When asked to choose from the top 23 famous Canadians based on a Canadian Broadcasting Corporation (CBC) poll, as to which one might be the best spokesperson for Canada, 26% of respondents chose David Suzuki. This is perhaps not surprising given the importance of the environment to Canadians in successive surveys. Wayne Gretzky was in a distant second position and Céline Dion (who was chosen by 30% of Quebecers) was third.

Although David Suzuki was the overall favourite, teens and adults chose David Suzuki for far different reasons. Teens were more driven by his world views and how he stands up for what he believes in; they consider him an "advocate" and an "activist". Adults chose David Suzuki for his intelligence, knowledge of important issues and because he is well respected.

Women tended to choose Wayne Gretzky for his strong family values, personality, honesty, understanding, fairness and for being well-respected and charitable. Men on the other hand chose Wayne Gretzky for his passion, intelligence, integrity and being fair, tough, compassionate and representing hockey.


Although Céline Dion was a favourite in her native province of Quebec, there were also differences between men and women as to why she was chosen. Men related in an impersonal manner and saw her as a good person, bilingual, international, global and as a humanitarian. Women saw her as a being magnificent, having a great personality and representing them. The most interesting reason of why women chose her was that Céline Dion shows that "dreams can come true."

The spokesperson exercise helps companies and government organizations determine which spokesperson or celebrities with which to best align their brand and marketing campaign and for what reasons. In looking at this, different age groups and genders respond on different emotional levels to the spokespersons. This has to be considered when determining who the target is and the best emotions to evoke to create a relationship with the customer.

Many of the insights as to people's love of Canada and how they vary by region, gender, life-stage, voting intentions are best understood by choosing and filtering groups of interest. Another useful method to gain insights is through sorting the open end verbatim and creating cases for each respondent. These methods of analysis enable us to understand why people feel so strongly or why they feel disenfranchised. This information allows us to identify people for follow-up probing and establish relevant questions which probe their quantitative responses.

Mike Gadd is President of ideas research group of Toronto. He presented to Government of Canada public opinion researchers on Monday, January 14.

**Spokesperson Summary**



"Our national Céline. She is everything to us. She is magnificent and has one of the most marvelous voices to hear. She has the gift to make herself heard and listened to"

"She is an example of determination. If we believe in anything we can achieve it. In Canada, we have all the necessary tools for success, regardless of who we are. Céline Dion represents Canada well: active, bilingual, open, tolerant, passionate"

*ideas*

Q26. Imagine you had to choose one spokesperson you think best reflects everything Canada stands for.

# INTERACTIVE VOICE RESPONSE FOR SURVEYS: HAS ITS TIME COME?

Interactive Voice Response (IVR), a technology used heavily by some US research firms, is only just making its debut in Canada, according to Susan Galley and Philippe Dorland of EKOS Research Associates, who presented to a meeting of Government of Canada public opinion researchers on February 19.

What is interactive voice response, or IVR? IVR is a technology that allows a computer to detect voice and touch tones during a telephone call. The IVR system can respond with pre-recorded or dynamically generated instructions to further advise callers on how to proceed. IVR systems can be broken down into a series of simple menu choices for use in telephone surveys. In Canada, IVR is already widely used by public and private sector organizations to provide information to clients.

The speakers began by identifying several important issues that survey researchers must confront in this era of fast-changing technologies:

- New telephone technologies, such as cell phones, and call screening devices are undermining the representativeness of samples for telephone surveys;
- The above technologies, combined with an increasing general reluctance by many in Canada to answer surveys, have contributed to an erosion of survey response rates over the past decade;
- The increasing role of the Internet as a survey tool cannot yet replace the telephone as a method of sampling the general public, owing to concerns about the quality and representativeness of Internet panels.

The speakers gave some general observations about IVR in research, stating that:

- IVR is comparable to computer-assisted telephone interview (CATI) except that no interviewer is present;
- IVR appears to be better-suited to short surveys (five minutes or less);
- IVR systems produce instant data files just as a CATI systems do;
- IVR can be used on any type of sample list.

The speakers argued further that IVR systems could offer the survey researcher the following advantages:

- Significant savings on the cost of interviewing;
- Possibly a superior method of interviewing on sensitive issues since there is no interviewer bias;
- Ease of conducting research in multiple languages;
- Possible recording of open-ended responses.

The speakers also identified the following possible drawbacks to using IVR:

- IVR does not appear to be appropriate for longer surveys;
- Some land-line subscribers do not have access to touch tone telephones, thereby representing a possible source of non response bias;
- The break off rates for IVR surveys may be higher;
- There is no way of ascertaining who in the household has answered the telephone.



## Final Reports, Please!

*Hundreds of reports are deposited with Library and Archives Canada (LAC) and the Library of Parliament each year. This ensures that research findings are shared across departments and with the public. Please deposit your final reports using the LAC Web site [www.porr-rrp.gc.ca](http://www.porr-rrp.gc.ca), as soon as they are complete.*

While IVR is infrequently used in Canada for surveys, the US Bureau of Labor Statistics has been using IVR to collect employment data since 1987. In addition some of the largest public opinion research firms in the US use IVR for their surveys.

The speakers reported that a study conducted for *Slate*, an online news and culture magazine, after the 2004 Presidential election found that the IVR-based surveys were on the whole more accurate predictors of the winner than surveys using traditional calling methods (*Slate*: "Let's Go to the Audiotape: Who nailed the election results? Automated Pollsters." (See [www.slate.com/id/2110860/](http://www.slate.com/id/2110860/)).

In another comparison, the US Polling Review Board examined the 2006 election results and found that the IVR polls (40 in total) were as accurate as the telephone surveys (60 in total).

The speakers concluded by saying that IVR systems are cost-effective and as such, are particularly useful for low-incidence populations for which no sampling frame is available. Other considerations as to whether or not to use IVR include: (1) whether or not the survey population uses touch tone telephones; (2) the length of the survey and; (3) the types of attitude scales used (shorter rather than longer).