

Marketing Research and Intelligence Association

Canadian Attitudes To Survey Research

Conducted Fall 2004

Research Background

- In recent years various pressures have begun to encroach on the reservoir of goodwill that Canadians have historically shown toward survey research. Chief among these has been a growing awareness of the threats to individual privacy posed by the rapid development of information technology.
- The explosion of direct selling and telemarketing activities has also added to the sensitivity Canadians have about participating in survey research. This situation is further exacerbated by some unscrupulous direct marketers and fundraisers who use the guise of survey research in their pitch.
- To help respond to these issues, the Canadian Survey Research Council (CSRC) was formed in 1992. Its mandate was to act as an umbrella organization to help guide the activities of the survey research industry with respect to issues of survey privacy.
- As of January 2005, CSRC, the Canadian Association of Marketing Research Organizations (CAMRO) and the Professional Marketing Research Society (PMRS) have joined together to become the Marketing Research and Intelligence Association (MRIA).

Research Objectives

- Recognizing the need for a periodic “pulse check” on Canadians’ attitudes to survey research and respondent privacy protection, a benchmark study was conducted in 1995, and was refreshed in 2001.
- With the agreement and support from PMRS, CAMRO and CSRC, an update to this study was done in the fall of 2004.
- Specifically, the objectives of this research were to :
 - Measure Canadians’ attitudes to survey research intrusion relative to other forms of non-survey contacts;
 - Determine the attitude of Canadians toward their survey research experience;
 - Evaluate whether Canadians are supportive of the role of survey research;
 - Identify Canadians’ opinions about certain privacy issues; and
 - Measure awareness and use of the survey registration system.

Methodology

- This study was undertaken on a co-operative basis using the volunteer time and talents of a variety of survey research companies and individuals (see Acknowledgements in the Appendix).
- The key elements of the methodology adopted for this research are as follows:
 - 2006 completed interviews
 - Conducted nationally using telephone (via a CATI system)
 - Random digit dialling household selection
 - Random individual selection among individuals aged 18 years and older (next birthday selection with male/female quota)
 - Conducted in the Fall of 2004
 - Results weighted in tabulation to balance age, sex and region
 - Margin of error of +/- 2.2%, 19 times out of 20.

Acknowledgements

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Matrix Research

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Mustel Research Group
Opinion Search
TNS-Canadian Facts

Highlights

This study provides evidence of a continuing favourable attitude among Canadians toward survey research.

- In 2004, Canadian participation levels in research surveys have significantly increased vs. previous years (1995 and 2001). **In 2004, 52% of Canadians participated in a survey in the past year vs. 45% (2001) and 42% (1995).**
- Two-thirds of Canadians who participated in survey research found the experience to be a “pleasant” one. This is unchanged vs. 2001 results.
- The generally positive attitude toward survey research continues to be fuelled by the recognition among Canadians that survey research serves a valuable purpose in society:
 - **87% agree that research surveys give people opportunity to provide feedback to “manufacturers and other organizations”, while 73% said the same regarding “public policy issues”.**
 - **78% agree that the research survey industry “serves a useful purpose”. 73% agree that research surveys and polls are “useful for government to understand how the public feels about issues”.**

Highlights

- Although only about a third (37%) agreed that research or polls are an invasion of privacy, some concerns exist :
 - More than half (56%) agree that some questions asked are too personal.
 - Only half (50%) agree that survey research firms “maintain the confidentiality of people’s answers” .
 - Less than half (44%) agree that “companies that conduct research surveys can be trusted to protect my rights to privacy” .
 - Furthermore, two-thirds of respondents refused on at least one occasion to participate in a survey in the past year. “*Did not have time/ was busy*” was the most common reason for refusing to participate.

Highlights

- Contacts attempting to “sell products and services” and to “collect money for some cause” were more frequent in 2004, compared to those made for “survey research”. **This trend was observed as well in 1995 and 2001.**

“Mugging and sugging”, where direct sellers and fundraisers pretend to conduct a research survey to gain the confidence of a potential target, can adversely influence the positive attitude that the general public has towards participating in research surveys.

- More than half (53%) were contacted for an alleged research survey, which actually turned out to be an attempt to sell a product or service. This practice occurred more frequently in Ontario.
- Nearly one-in-four (27%) were contacted for an alleged research survey that actually turned out to be an attempt to solicit money for charity or some other cause. This practice occurred more frequently in the Prairies and B.C.
- In both cases, about half of such contacts were made in the last six months alone. Levels appear to be in line with those reported in 2001.

Highlights

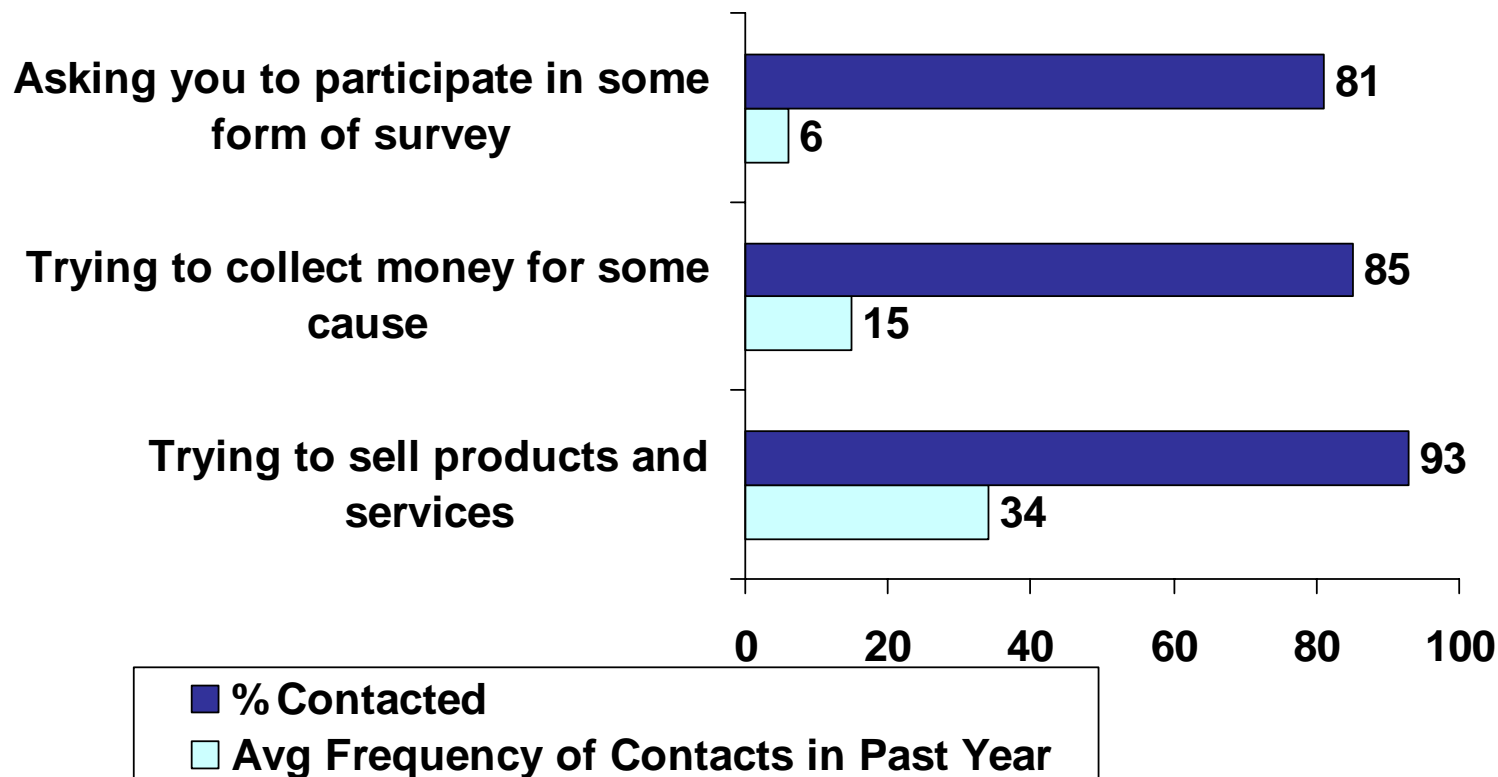
- Given the public's need for privacy and a mechanism for feedback as well as the incidence of "mugging and sugging", the industry has established a survey registration system to allow the general public to confirm survey legitimacy.
 - Over half of respondents (52%) would be "more willing" to participate in surveys where study legitimacy could be verified. This is significantly higher compared to 2001 levels (47%).
 - Awareness levels have remained unchanged vs. 2001. Only one-in-ten respondents are aware of the survey registration system.
 - As observed in 2001, close to two-thirds of respondents would likely use the toll-free number system to check for survey legitimacy if the need arose. Younger (18-24 years) and older (65+) respondents, and those residing in Quebec, are less likely to use the system.

Detailed Findings

Canadians get more frequent contact from organizations trying to sell products or raise funds than for survey research.

Have you been contacted in the past year, either in person, by phone or by mail, by an organization?

Base : Total 2004 Sample



In the last nine years, contact levels have remained relatively stable.

Have you ever been...

Frequency in Past Year

Contacted by a company trying to sell products/ services	Frequency in Past Year					
	None	1 to 5	6 to 10	11 to 20	21 to 50	51+
1995	8	35	21	15	11	9
2001	9	29	19	18	12	12
2004	7	25	17	16	15	17

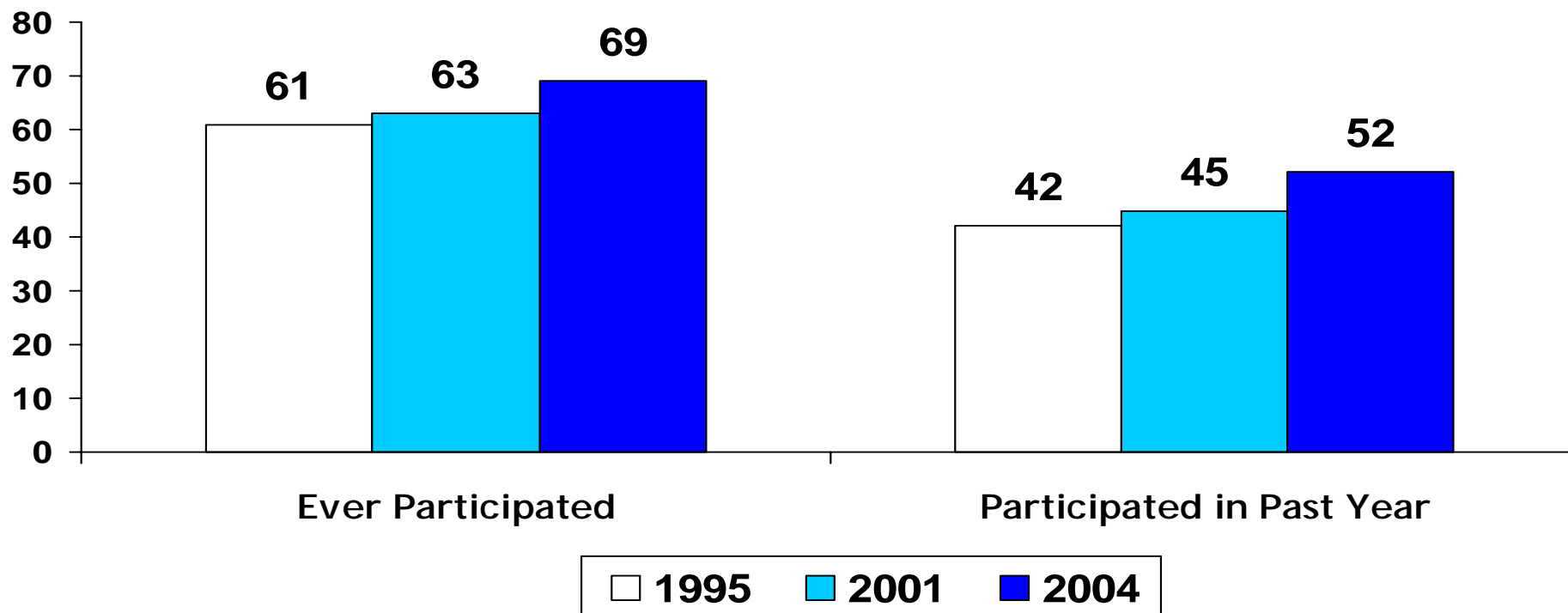
Contacted by an organization trying to collect money for charity or some other cause	Frequency in Past Year					
	None	1 to 5	6 to 10	11 to 20	21 to 50	51+
1995	13	45	20	12	8	2
2001	14	39	21	14	8	4
2004	15	38	17	13	9	5

Contacted by a research company to participate in an opinion survey	Frequency in Past Year					
	None	1 to 5	6 to 10	11 to 20	21 to 50	51+
1995	23	64	9	3	1	0
2001	17	60	14	6	2	1
2004	19	57	13	6	2	2

Somewhat higher participation levels in research surveys are observed in 2004 compared to previous years.

Participation in Survey Research

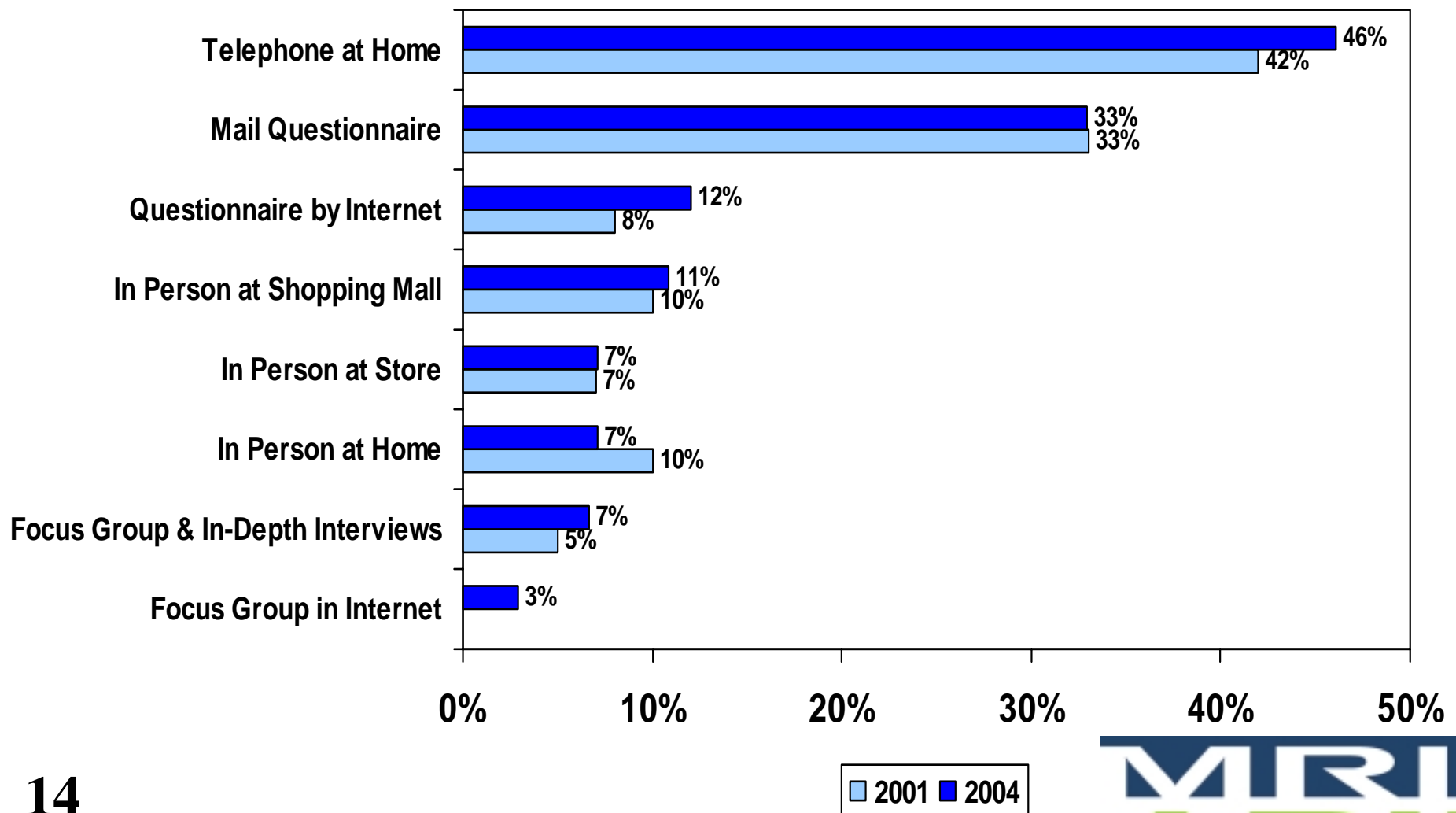
Base: Total Sample By Selected Year



Telephone and mail-based studies remain the most common types of research Canadians participate in.

Participation in Selected Types of Research in Past Year

Base: Total Sample 2004 and 2001



Respondents to survey questionnaires on the internet tend to participate more frequently.

Participation in Selected Types of Research in Past Year

Base: Total Sample 2004 (N=1051)

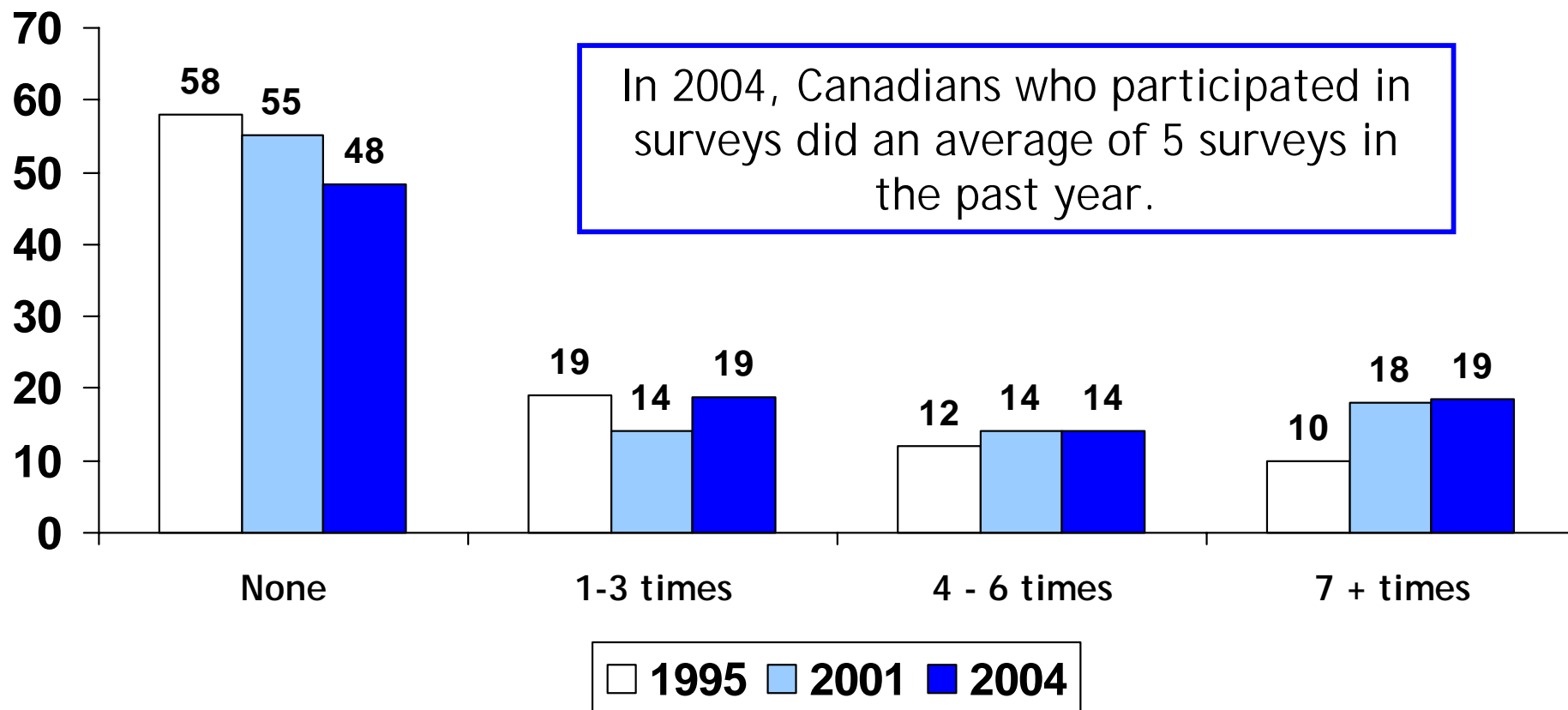
Type of Research	Number Saying They Participated in Past Year	Frequency of Participation in Past Year					Average
		1 x	2 x	3 x	4 x	5 or more x	
Telephone at Home	941	27%	25%	17%	9%	20%	3.9
Mail Questionnaire	670	37%	30%	12%	6%	14%	2.9
Questionnaire by Internet	248	29%	20%	13%	4%	31%	5.6
In Person at a Shopping Mall	223	44%	33%	7%	3%	11%	2.3
In Person at a Store	150	43%	24%	7%	3%	17%	3.6
In Person at Home	148	46%	24%	8%	5%	12%	2.7
Focus Group or In-depth Interview	141	55%	21%	10%	3%	6%	2.1
Focus Group or In-depth Interview on Internet	64	39%	19%	13%	3%	19%	3.2

- Frequency of survey participation for mail questionnaires and online surveys increases with educational attainment.

More Canadians participated in survey research in the past year, compared to 2001. Among those participating in a survey in 2004, close to 1 in 5 participated in 7 or more surveys.

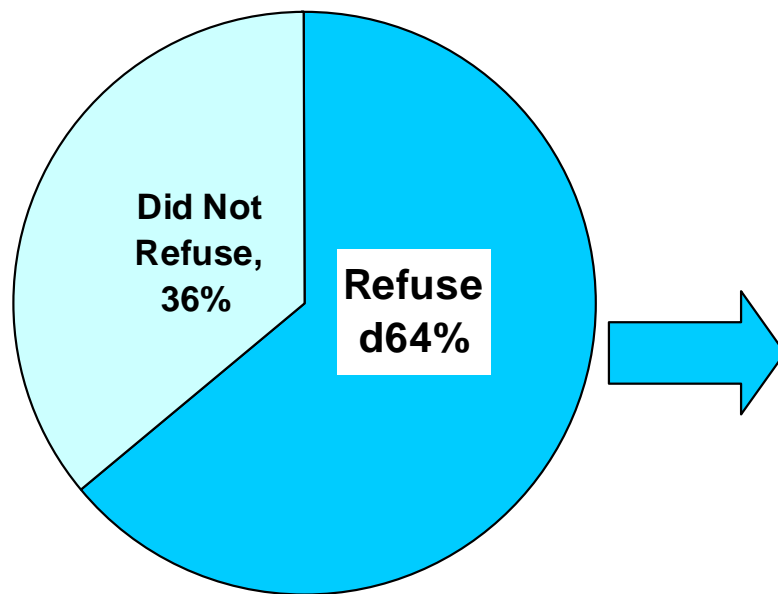
Survey Participation in the Past Year

Base : Total Sample By Selected Year



In the past year, close to two-thirds (64%) have refused to participate in any survey research. "Not having the time/ being busy" is the top reason given for refusing to participate in a survey.

Refusal to Participate in Any Survey in Past Year



Top Reasons for Refusing to Participate in Survey	
Base: Total Refusing to Participate in Past Year	N=882
Did not have time/ busy	48%
Bad timing/ inconvenient	25%
Not interested in subject or product	16%
Survey was too long	9%
Don't like surveys, find them annoying, a waste of time	8%
Questions are too personal, invasion of privacy	8%
Not in the mood, didn't feel like doing it	7%
Too many calls	4%
They were trying to sell me something, making solicitations	3%

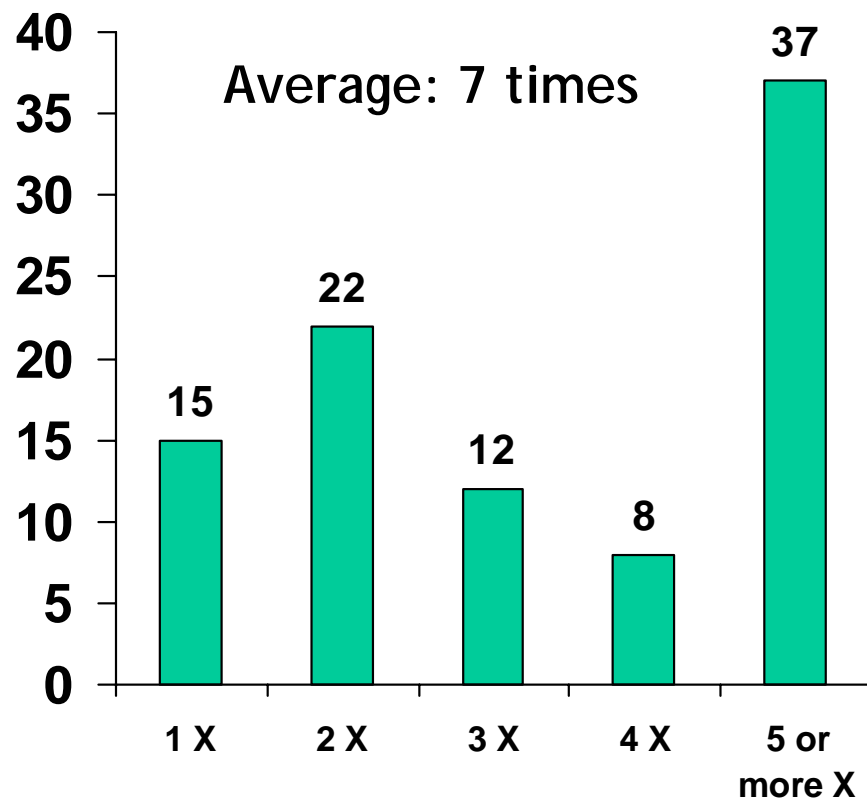
Higher refusal rates are observed among:

- B.C. region respondents
- Respondents with older children
- Respondents with higher educational attainment

On average, those who refused to participate in a survey did so about 7 times in the past year.

Number of Times That Refused to Participate in Past Year (2004)

Base : Respondents who refused

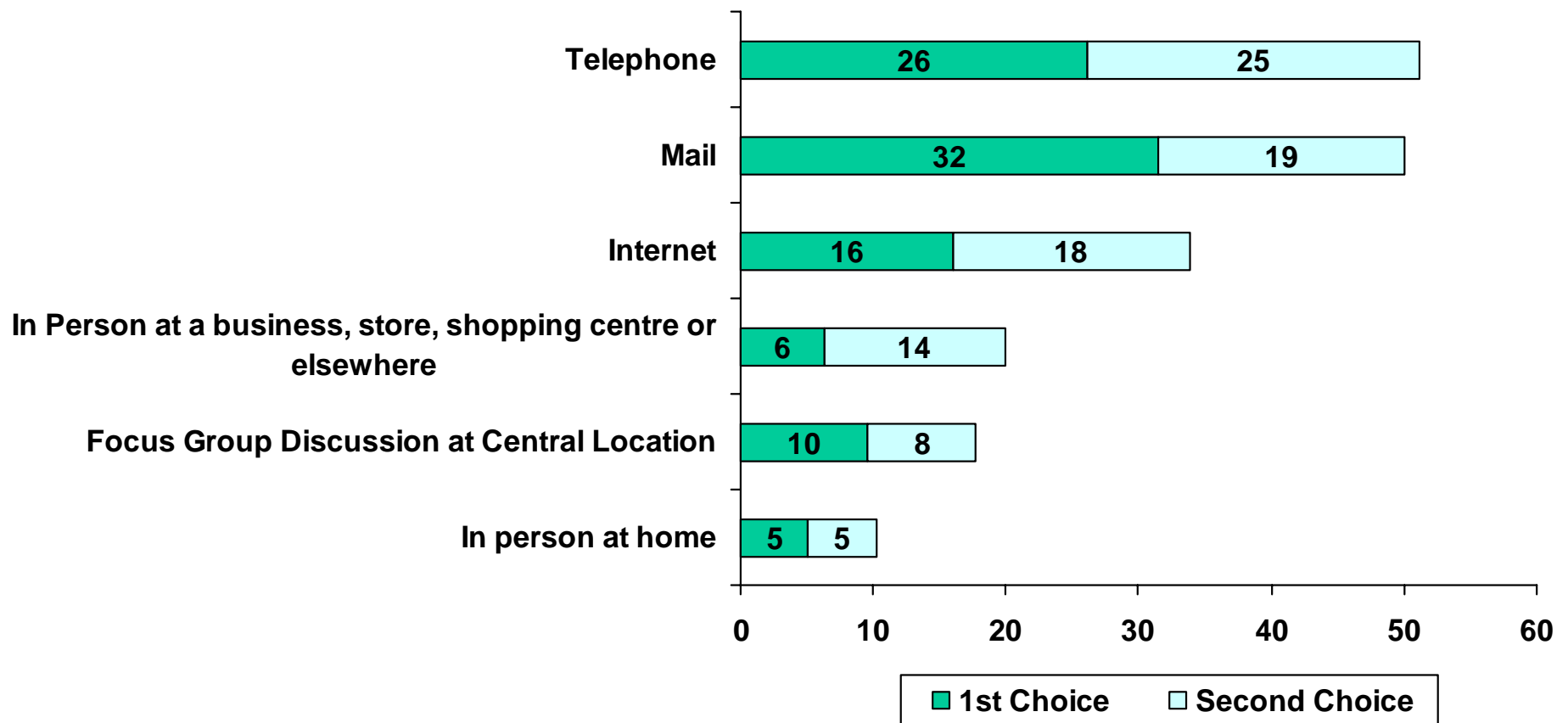


- Higher frequency of refusals are observed among Canadians:
 - Who have had unpleasant survey experiences;
 - Living in large urban communities;
 - Younger age groups (18-44)
- Lower frequency of refusals ("politeness factor") are observed among Canadians :
 - Living in Quebec
 - Language preference is French
 - Small cities (pop. 10-99M)

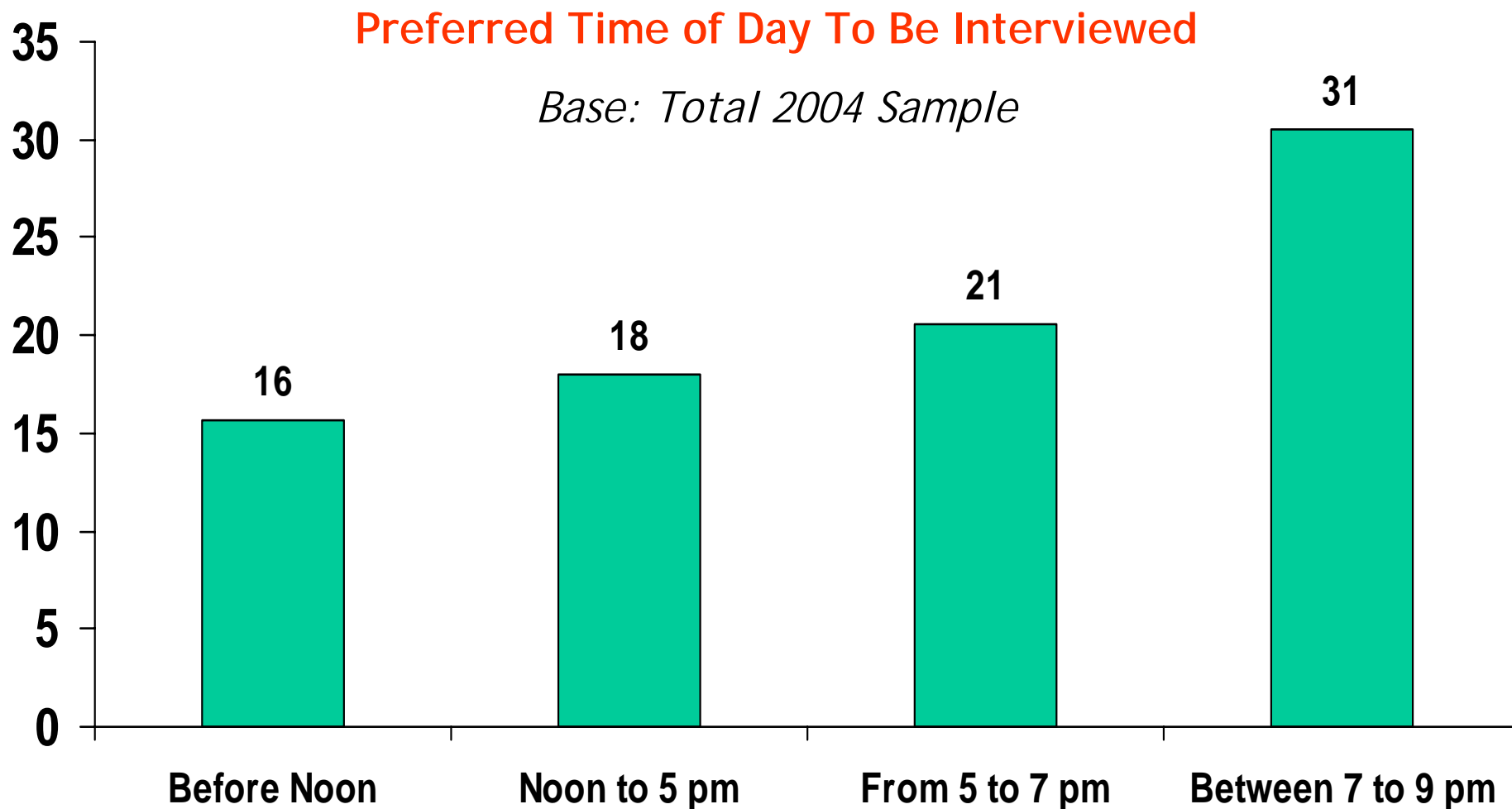
Respondents prefer to participate in research initiatives where Telephone or Mail methodologies are employed.

Respondent Method of Choice When Participating In Surveys

Base: Total 2004 Sample



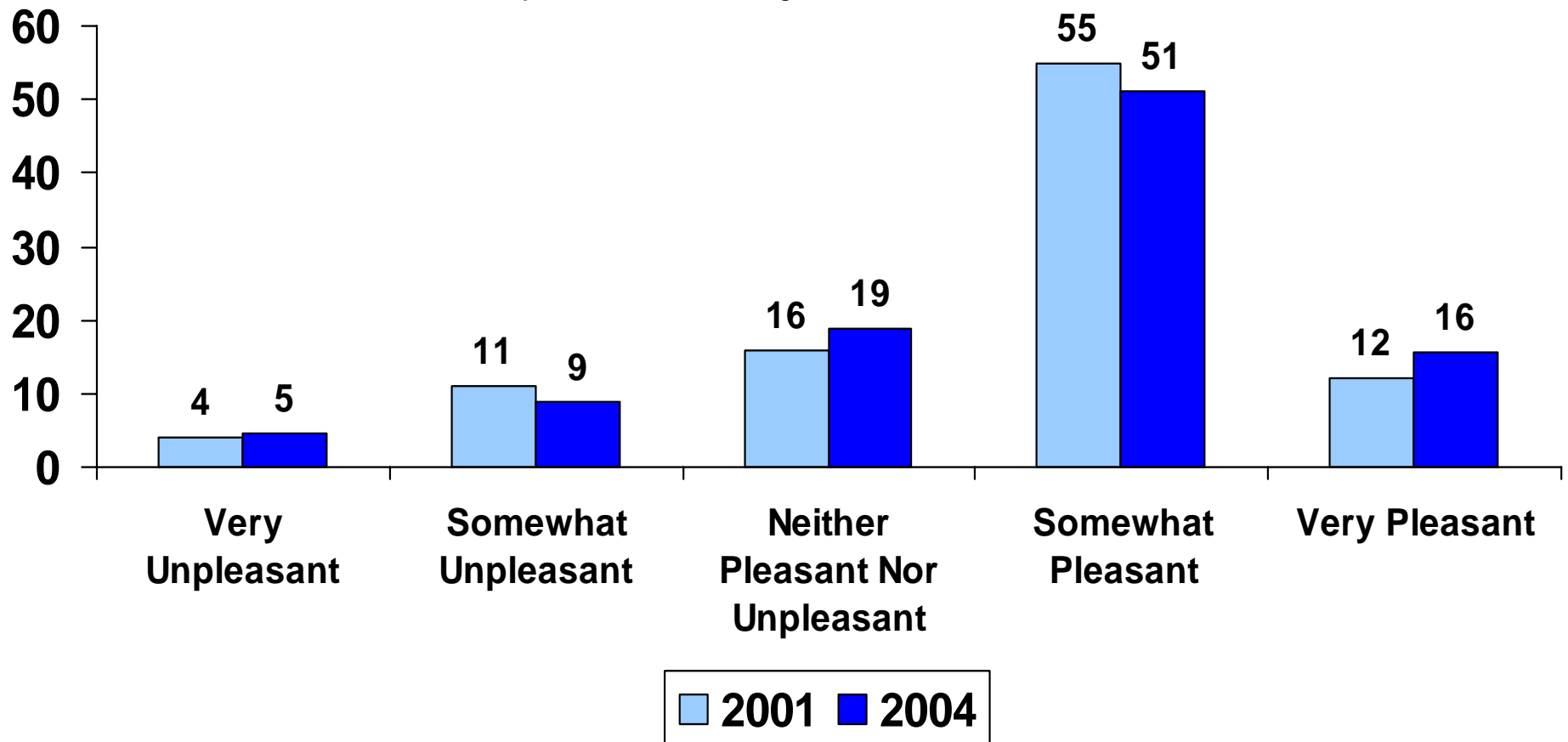
Close to a third of respondents prefer to be interviewed between 7 to 9 pm. Seniors prefer to be interviewed during the day (before 5 pm).



About two-thirds of respondents describe their survey experience as pleasant. Levels are in line with those reported in 2001.

Attitude Toward Survey Experience

Base: Total Participated in Survey in Past Year



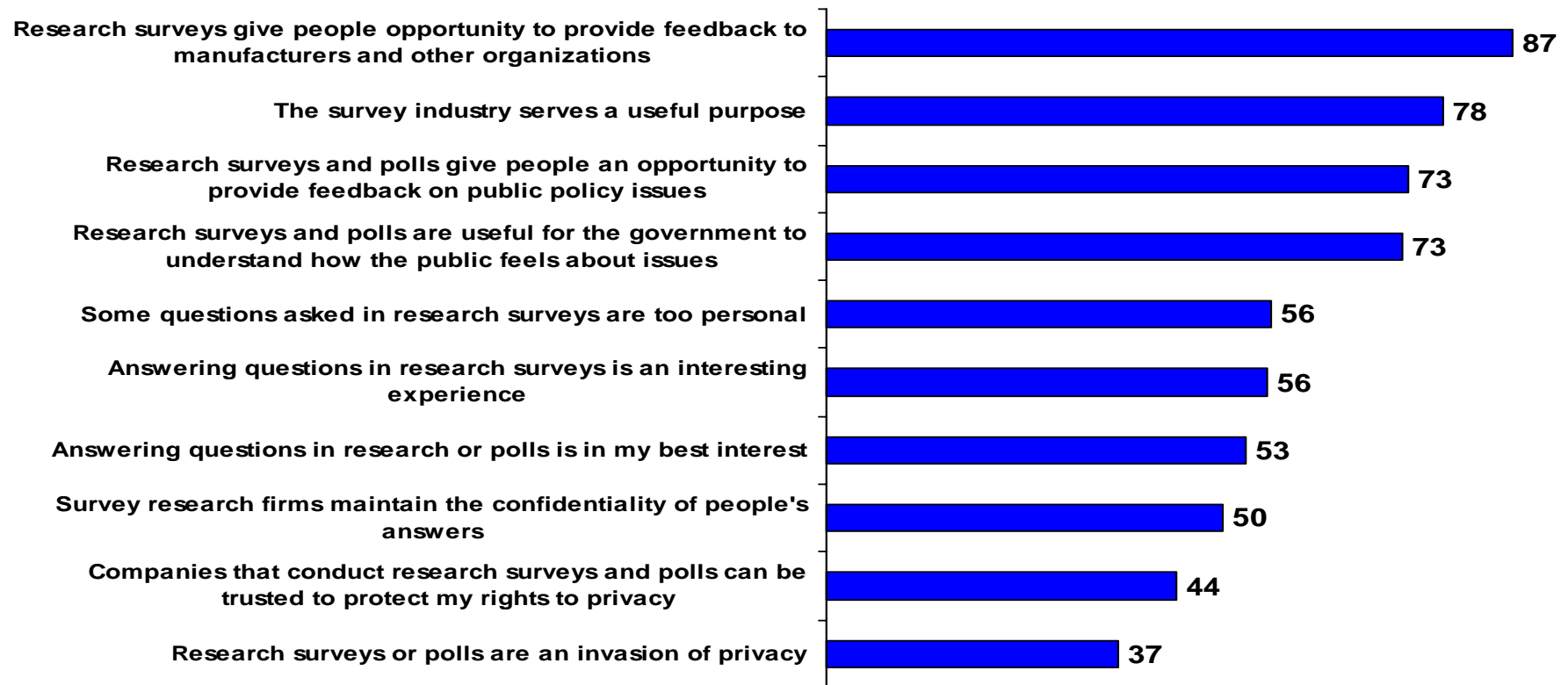
As observed in 2001, a positive attitude toward survey experience is less prevalent among Quebecers at 53.9%.

The majority agree that research surveys are useful for providing valuable feedback regarding goods, services and public policy issues. Surveys are not generally regarded as an “invasion to privacy”. Concerns however exist regarding survey confidentiality and questions being “too personal”.

Attitudes Toward Specific Survey Issues

Base: Total 2004 Sample

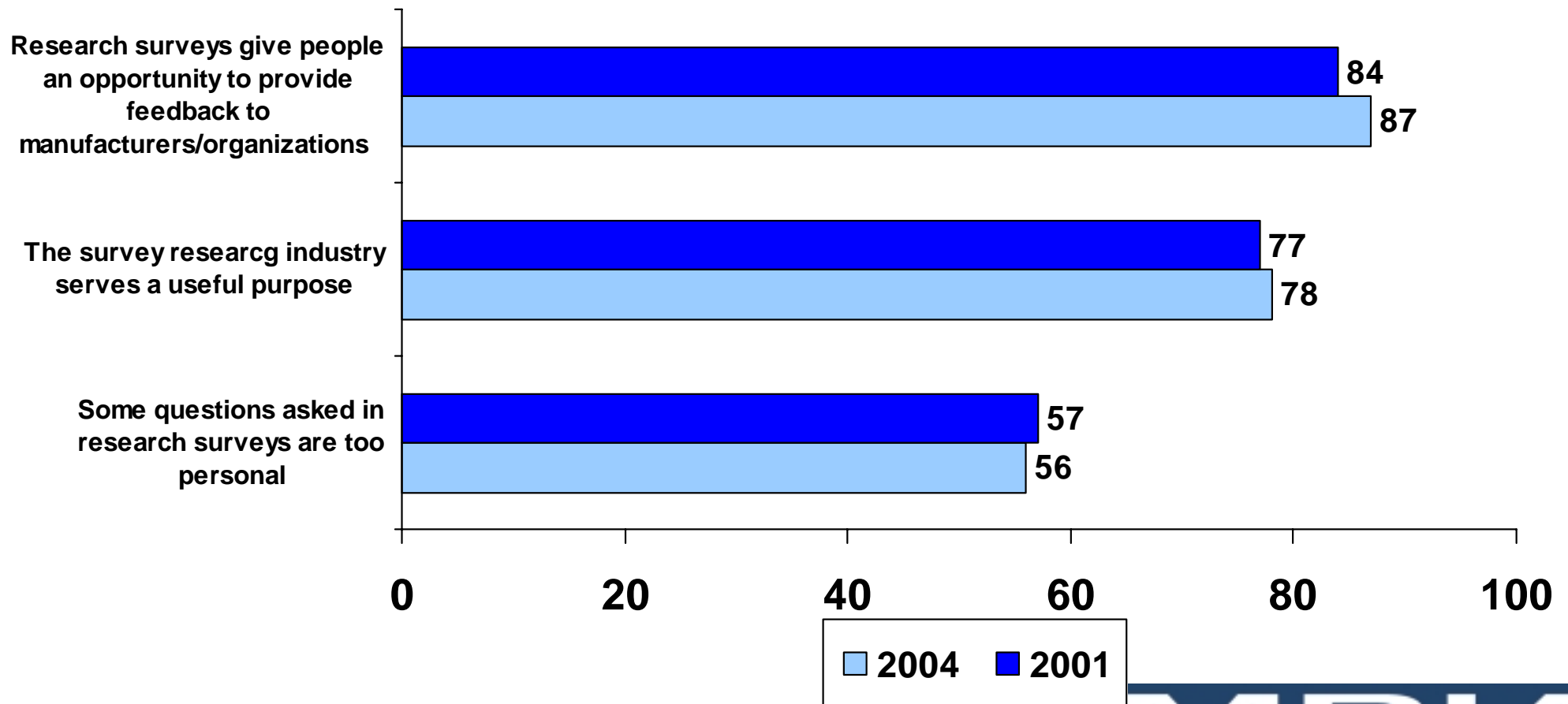
% Saying Agree (based on 3-point semantic agreement scale)



Canadian attitudes toward specific survey issues remain unchanged vs 2001.

Attitudes Toward Specific Survey Issues

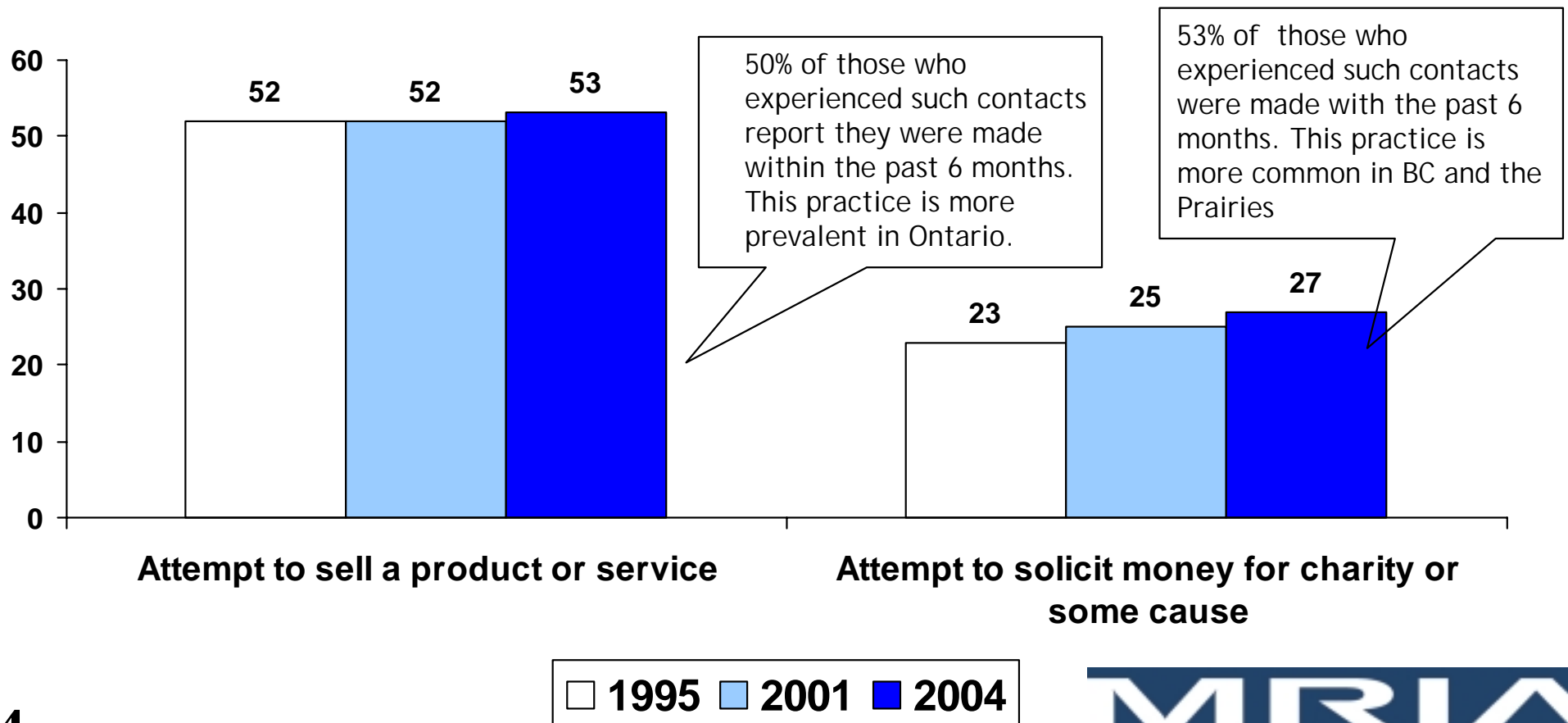
Base: Total Sample for Selected Years



“Mugging and sugging” levels are similar to those reported in 2001. These actions continue to pose a threat to the popular goodwill that Canadians extend when participating in research surveys.

Have you ever been contacted for a research survey which actually turned out to be an...

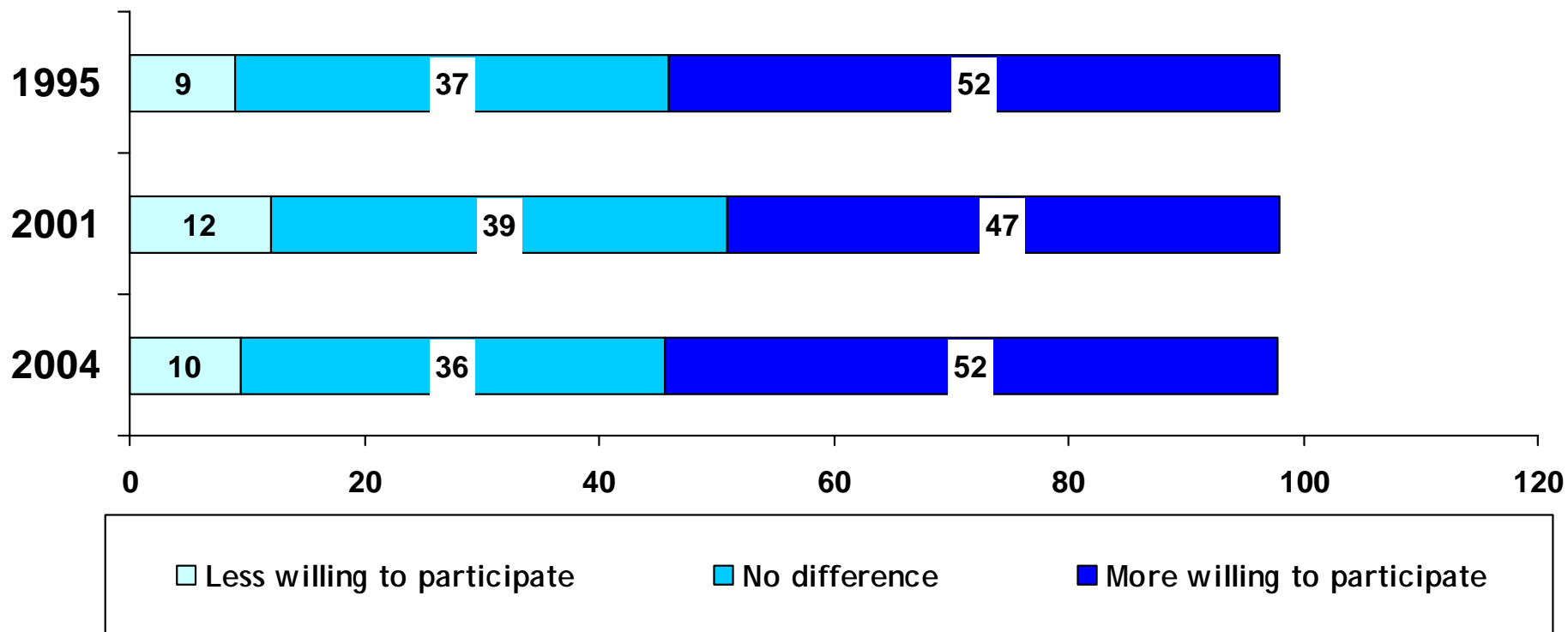
Base : Total Sample By Selected Year



As different factions continue to cast a shadow on survey legitimacy, the proportion of respondents who would be more willing to participate if surveys can be verified as legitimate, is back to 1995 levels.

Would you be willing to participate in a survey that you could be sure wasn't being used for selling or fundraising?

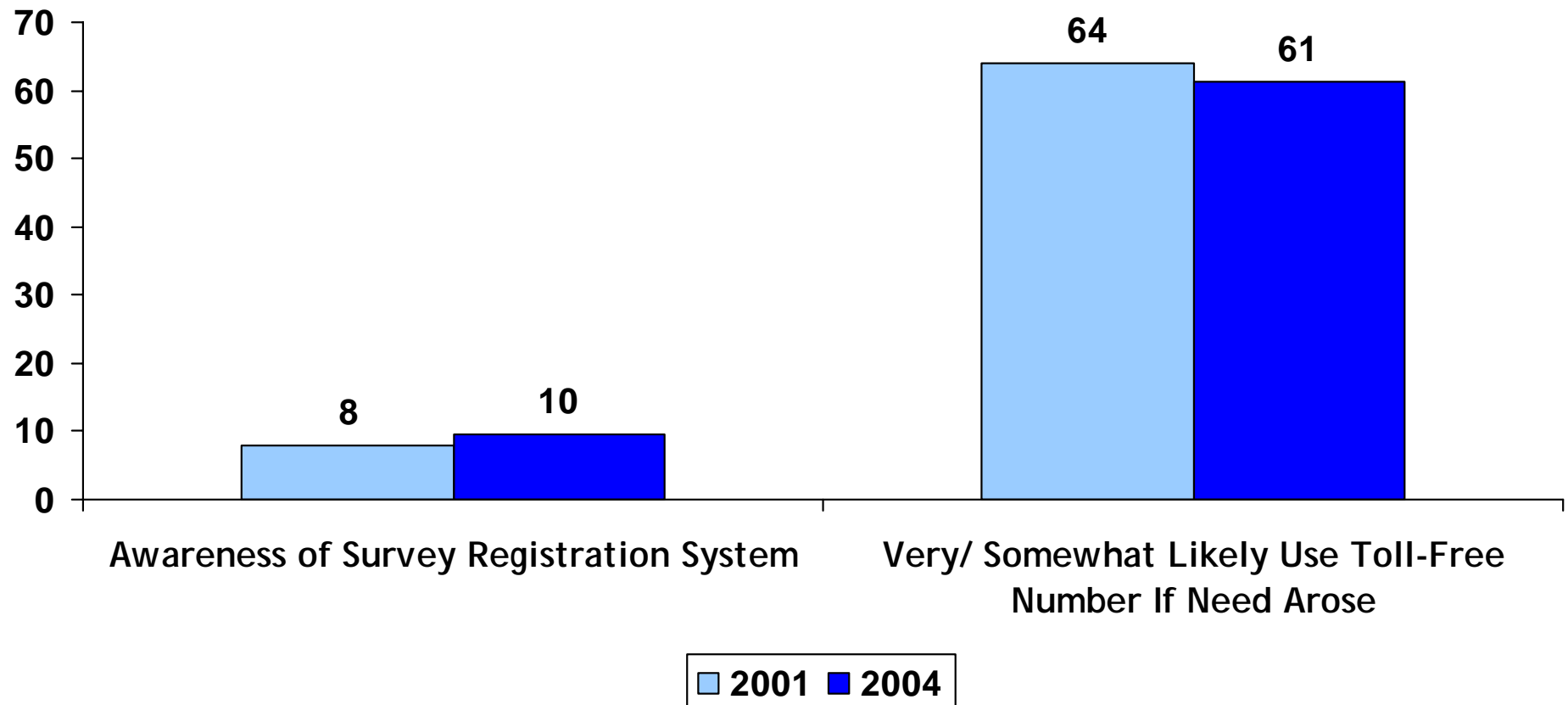
Base: Total Sample By Selected Year



General awareness levels of the Survey Registration System remains low. Three-of-five respondents claim they would likely use the toll-free number system if the need arose.

Awareness and Potential Usage of Survey Registration System

Base: Total Sample By Selected Year



A majority of respondents subscribe to a Telephone Answering Service and/or Caller ID to screen calls.

Telephone Technology

- Three of four (76%) respondents have a telephone answering service, though less than half (43%) use it to screen calls.
- More than half (54%) subscribe to Caller ID.
- About 15% subscribe to or own a distinctive ring.
- One in ten respondents subscribe to or own call blocking.

Internet

- About two-thirds (68%) use the Internet.
- The majority (73%) of respondents who use the Internet access it on a daily basis.

Appendix

Demographics and Detailed Methodology

Demographics

	Unweighted Total	Weighted Total	
Gender	2006	2006	%
Male	975	970	48%
Female	1031	1036	52%

	Unweighted Total	Weighted Total	
Age	1996	1996	%
18 to 24	260	240	12%
25 to 34	372	347	17%
35 to 44	426	427	21%
45 to 54	399	397	20%
55 to 64	294	319	16%
65 and older	245	266	13%

	Unweighted Total	Weighted Total	
Educational Attainment	1871	1867	%
Some Secondary	205	206	11%
Grad, Secondary	402	403	22%
Some / Grad College	530	522	28%
Some/ Grad University	734	736	39%

	Unweighted Total	Weighted Total	
Household Composition	2222	2220	%
No Child <20 years	1350	1361	61%
Child <10 years	407	400	18%
Child 10-14 years	255	251	11%
Child 15-19 years	210	208	9%

	Unweighted Total	Weighted Total	
Language	2006	2006	
English	1538	1569	78%
French	468	437	22%

	Unweighted Total	Weighted Total	
Region	2006	2005	%
Atlantic	160	155	8%
Quebec	528	493	25%
Ontario	731	761	38%
Prairies	327	331	17%
British Columbia	260	265	13%

	Unweighted Total	Weighted Total	
Community Size	2006	2007	
Under 10 M	425	421	21%
10 - 99 M	256	258	13%
100- 249 M	179	181	9%
250 - 499 M	164	167	8%
500 M+	982	980	49%

Detailed Methodology

The questionnaire is appended.

The majority of questions in the 2004 survey questionnaire have been carried forward directly from the 2001 survey. However, the design committee added the following questions, new for 2004:

- 1ai, 1bi, 1ci
- 3g
- 4a/b/c
- 6 (items 4 to 10)
- 7a/b
- 12a/b/c/d

Average interview length was just under 12 minutes.

All interviews were conducted using Computer Assisted Telephone Interviewing (CATI). The initial questionnaire was programmed in the Dash CATI language and this program was forwarded to the 6 field companies that are Dash users. The remaining 4 companies each re-programmed the questionnaire in their own CATI software language.

Detailed Methodology

SAMPLE

A national random digit dial sample was drawn, with each record containing area code and phone number along with geographic identifiers down to the CMA/CA and CSD levels as defined by Census Canada. The sampling process was based on drawing an nth sample of listed residential numbers across all 10 provinces and then randomizing the last 2 digits for each number.

To ensure proportional geographic and community size distribution across the 10 provinces, the total sample is divided into 46 “call groups” on the basis of PCMAs, groups of CMAs and CAs and rural areas within each province. A specific quota of completed interviews was assigned to each call group, proportionate to the 2001 Census. The sample was therefore self-weighting by province and community size.

Sample was divided and distributed among participating companies according to call group divisions. Generally, companies conducted interviews in the region(s) in which their field office(s) were located so that long distance costs could be minimized for this volunteer survey.

Detailed Methodology

SAMPLE Continued

Sample allocations were discussed with each participating company before any sample was distributed. The number of completes required in a particular region, the CATI capacity of the participating company, and existing business commitments for their CATI facility were all factors included in the allocation.

In order to minimize the need to draw and send out additional sample later, each company was provided with excess sample for their assigned call groups. Unfortunately, communication to the participating companies was not clear, and most loaded the entire sample provided at the beginning rather than releasing it in stages. As a result, completion quotas were achieved with fewer callbacks resulting in a lower response rate than could otherwise have been achieved.

Detailed Methodology

FIELD WORK DATES

All interviews were completed between October 7 and November 9, 2004. While start-up was staggered somewhat, the majority of the interviews were completed in the different regions within the same core time period.

LANGUAGE OF CONTACT

The CATI form was available in both French and English. Among completed interviews, 77% were completed in English and 23% in French.

SCREENER

A standard screener was included for all participants. The only difference among companies was that the identification of the company calling the respondent was the name of the participating company at that calling site.

Detailed Methodology

Total Numbers Attempted	29388
Not in service	6607
Fax/modem	2069
Business line	2254
Total Eligible Numbers	18458
Busy	609
Answering machine	2770
No Answer	3457
Language problem	629
Illness/incapable	28
Selected/eligible respondent not available	3374
Total Asked	7591
Household refusal	3062
Respondent refusal	1976
Qualified respondent break off	279
Cooperative Contacts	2274
Response rate	12%
Disqualified – Occupation	89
– No one 18+	122
– Gender quota filled	57
Completed Interview	2006

Call
Disposition
Report