

Consumer Panelist Versus Random Digit Dial Respondent Performance Revisited: How Similar and How Different?

Overview

This study reconfirms the appropriateness of panel sample sourcing for survey research studies such as those underlying Synovate TeleNation Omnibus efforts that have been offered to the research community since 1986. Panel results match random-sample results within established statistical guidelines while adding significant operational benefits.

Over the years numerous studies have documented the comparability of results from panel sampling with those from random digit dialing in controlled studies comparing telephone survey practices. Most notably, Synovate studies of 1988¹ and 1994² merit an update in the wake of important developments impacting both options.

Obstacles to the assembling of a truly random telephone sample have never been greater, while consumer panel recruitment and retention continue to pose increasing challenges to current panel managers and their clients. While neither option offers a perfect or even near-perfect solution, the current research contributes to the growing body of literature recommending household consumer panel for most custom applications.

Background

Household panels have been in existence since 1941 when they were introduced for commercial purposes. Market Facts (now Synovate) began operating commercial access panels in 1949. Originally designed for longitudinal tracking of consumer behavior through paper-and-pencil diaries, these resources also served – and continue to serve credibly – as sources of sample for attitudinal, awareness, and usage studies.

Then as now, the promise of access panels was simple and straightforward: panel operators would provide economical access to reasonably balanced panels of respondents by distributing costs of recruitment and maintenance across multiple client users. Value would be added through pre-screening panelists for particular purchase activities, for illnesses, for demographics such as the presence or absence of babies or teenagers, for psychographics, and so on. Household facts are updated annually in Synovate's practice. In matters of race and ethnicity, African-Americans, Asians and Hispanics are pre-identified, the latter group now even further segmented by the more powerful panels into acculturation segments, capable of responding to Spanish- as well as English-language surveys.³

Additionally, surveying panelists brings with it the opportunity to recontact respondents. For example, respondents can be revisited months after purchase intentions are voiced to assess follow-through. Ultimately the successful panel operator builds an ongoing relationship with the panelist, assuring both compliance and a climate of confidence that, when it comes to survey questions, means "there are no wrong answers." Panelists' activities on the panel are monitored and regulated, so that they are not overburdened, nor allowed to participate for specified "exclusionary" periods after being sensitized by exposure to a usage or ad awareness study in a category. The European term of "access panel" appropriately describes these managed resources, assembling and organizing as they do consumer households (in Synovate's case over 1.3 million) for assignment and reassignment to a stream of study projects.

As technology advances so do data collection and panel operations. With the advent of UPC codes on many package goods in the late 1970s, the burden of reporting purchases was eased. This enabled companies like IRI

¹ Verne B. Churchill, "Learning to Live with Continuous Household Panels," *TeleNation Reports* (Market Facts, Summer 1988), cited in G.A. Churchill, pp.156-157.

² "Mail Panels vs. General Samples: How Similar and How Different?"

³ For a pioneering example see Synovate's Hispanic Diversity Panel, launched in 2004.

and AC Nielsen to develop “electronic” panels in the U.S. where purchases were recorded by scanning items in-home by panelists with a “ScanKey” (IRI) or “Wand” (AC Nielsen).⁴ Perhaps the most dramatic of all panel breakthroughs occurred in the mid-1990s with the emergence of Online panels. The Online panelist receives surveys periodically, accounting for an estimated 28%⁵ of custom research conducted in the U.S. today.

Online research has proliferated in the last nine years based on the most obvious benefits – the speed, the programming advantages, the elimination of interviewer bias, and, not inconsequentially, the lower cost. These overwhelming plusses converted many holdouts to panel approaches.⁶

The Quest for Representative Samples

The preference for random sample methodologies is explicit in textbook definitions of the 1980s. For example, the definition of ‘random digit dialing’ is “a method of obtaining a representative sample in a telephone interview by using a random number table to generate telephone numbers.”⁷ This begs the question of representivity by assuming that a random number table and a telephone facility are entirely sufficient. Refusal and non-response bias are overlooked in the rush for scientifically sound sampling design.

“The main disadvantage of panels is that they are nonrepresentative,” writes Churchill in his seminal textbook.⁸ A few pages later Churchill reviews Market Facts’ (now Synovate) extensive research from 1988 documenting strong similarities between panel and RDD on most behavioral descriptors.⁹ “Panel studies,” as defined in Zikmund’s text,¹⁰ are reserved for longitudinal studies, where re-contact is possible, rather than for today’s typical application of panels – like Synovate’s Consumer Opinion Panel – for sample for one-off consumer studies drawing from a pool of respondents who have pre-agreed to participate in research, and for whom some basic demographics (and possibly

⁴ The true pioneers of in-home scanning panels were AGB (with its Brandscan service in Australia) and NPD’s Homescan panel in the U.S., both of which were later acquired by Nielsen. See Jephcott and Clemens, “Tomorrow’s Panels are Here Today,” 1987 Proceedings of the ESOMAR Conference, Dusseldorf.

⁵ Inside Research, 15(1), January, 2004. Forecasts project that more than one third of U.S. survey research will be conducted Online by 2006.

⁶ Online research requires a double opt-in recruitment step that makes a panel-pool of respondents fundamental to the design.

⁷ William Zikmund, Exploring Market Research (2nd Edition) Chicago: Dryden Press, 1986, pp. 768-769.

⁸ Gilbert A. Churchill, Marketing Research: Methodological Foundations (5th Edition). Fort Worth: Dryden Press, 1991, p. 153.

⁹ Verne B. Churchill, “Learning to Live with Continuous Household Panels,” op. cit.

¹⁰ William C. Zikmund, op. cit, p. 768.

psychographics) are known through screening at the time of enrollment.

Previous Research on Research

In 1994 Market Facts (now Synovate) published an important research-on-research paper (No. 59), identifying the benefits of a multi-purpose household panel as a sample source for custom research. This effort was in response to lingering skepticism raised by researchers “weaned on probability sampling methods.”¹¹ The resulting study contributed to further the weaning process from “random”¹² approaches, towards the panel-based options available ten years ago. The 1994 study concluded that “all in all, the analysis of consumer and lifestyle comparisons between the two groups supports the use of panel samples. The promise of randomly sampled survey contacts, however, remains a lofty ideal, despite long-standing evidence of its exaggerated purity.”¹³

Voicing concern about growing difficulties building representative samples is not new; almost 15 years ago The New York Times commented, “Deluged by a growing number of telephone solicitations and increasingly jealous of their time, more and more Americans are refusing to participate in market research surveys.”¹⁴ Telephone banks which once would place seven to eight calls to find a willing respondent now have to call 30-35 to find one. This ratio held true for the RDD portion of the study described here, when the Synovate call center placed 34,465 calls to obtain the 1,000 needed completes, compared with 8,920 calls to complete the panel cell interviews, yielding the same number of completes. Working, current telephone numbers were more prevalent with the panel (87% versus 71%), and the overall panel

¹¹ “Mail Panels vs. General Samples: How Similar and How Different?” Despite the title, the “Mail” panel was used to describe the pool of households which was ultimately utilized to field the panel-based telephone leg of the study. Interviewing took place during a 16-day period in the spring of 1994.

¹² See Bickart and Schmittlein (1999) who estimate that an extremely small percentage of the total U.S. adult population, some 20-23%, account for 100% of survey responses in any given year., and “a tiny 4% to 5% of adults account for more than half the survey responses.” This statistic includes participation in random selection design studies. Of course, the survey may be looking for respondents representative of a popular segment, thereby including by design some people more than others. Still, the clear implication of this research, based partially on data provided by Market Facts, exposes the assumption of “random” selection and participation in non-panel-based surveys, whether or not these surveys require to get representative samples.

¹³ “...more and more Americans are refusing to participate in market research surveys.” The New York Times, October 5, 1990, p. 1, cited in Bickart and Schmittlein, 1999. And: “...we as an industry are finding it increasingly difficult to reach representative samples of respondents, economically” Walker: Industry Image Study, 9th Ed., 1990, cited in Bickart and Schmittlein, op.cit. p 286.

¹⁴ The New York Times, October 5, 1990, p.1, cited in Bickart and Schmittlein, op. cit., p. 286.

production rate (defined as the number of completed interviews per hour) was 69% higher on the panel side.

A small but committed community of consumer package goods researchers as well as practitioners of other verticals continues to advocate random approaches, including Random Digit Dialing (RDD).¹⁵ Consequently, this current research was designed to contribute to the knowledge available to Synovate and its clients on this topic by exploring the comparability of the two sample approaches, while addressing specific lingering concerns about open-ends and unaided awareness comparability.

Research Methods

Synovate's TeleNation Omnibus service provided an ideal vehicle for staging a parallel study comparing panel to random-sample responses to a series of survey questions covering seven distinct areas:

- Politics/Economics
- Product Ownership/Usage
- Shopping/Purchases
- Personal Health
- Advertising/Media/Internet Behavior
- Religious/Charitable Activities
- Consumer Survey Participation

To represent the general U.S. adult population, a random-digit-dial sample was selected using a single stage technique to select each sample from all available residential telephone numbers in the contiguous United States. For the Synovate Consumer Opinion Panel (SCOP) sample, a nationwide sample was compiled following the procedures used in typical national¹⁶ SCOP telephone surveys. The sample was balanced using four "balancing factors" whose national distributions are regularly updated based on U.S. Census estimates. The sample was drawn to approximate actual distributions of household income, age and gender within region. Standard panel policy of limiting the activity of recent panel recruits was in effect, limiting differences that might show up with panel tenure, conditioning effects, etc.

The parallel study resulted from 1,000 analyzed weighted responses from each cell. Interviewing fielded by the TeleNation Omnibus Team at Synovate for both random and panel cells took place on Friday evening through Sunday evening September 17-19, 2004. The same facilities and oftentimes the same interviewers worked on both samples to avoid possible response differences resulting from different interviewing skills or styles.

¹⁵ Note that the Federal Government, academic institutions, and some media companies often still consider RDD or some well defined probability sampling methodology to be the gold standard.

¹⁶ A complete description of the Synovate Consumer Opinion Panel can be found at:
http://www.synovate.com/en/solutions/branded_solutions/consumer_opinion_panel/index.php

Respondents were selected within households using a form of controlled quota sampling to achieve a proportionate number of female and male respondents. The surveys administered to the two samples were parallel in content and structure so the validity of the results would not be impaired by possible "context effects." The interviews each averaged 16 minutes to complete.

As is customary in reporting national results, the data from both samples were adjusted through weighting to more accurately represent the U.S. adult population. Three variables were used in the weighting: region, household income and age by gender.

Comparing the Responses: Random vs. Panel Samples

Table 1 presents 45 out of a total of 50 questions for which the two samples – one randomly generated, the other derived from Synovate's Consumer Opinion Panel – provide statistically comparable results (95% confidence level).¹⁷ The questions cover a range of topics, from political, religious and economic beliefs and opinion, to questions of personal health, general shopping and internet activity, as well as media consumption.

Thus, 90% of the responses are comparable. This result supports the comparability of the two samples, especially given that the established standard of a 95% confidence level would allow a 5% variance, and these data approach what would be accounted for by mere chance. Questions are presented in Table 1 verbatim to provide a sense of the richness of the range of questions, as well as to enable question-by-question assessment.

¹⁷ Questions where possible followed a four-option format: Agree (or Yes)/Disagree (or No)/Don't Know/No Answer choice pattern. Some questions required presentation of more choices, i.e., "How would you describe your views on political matters?" allowed for Moderate, Conservative, and Liberal, in addition to the Don't Know and No Answer. Reporting political preferences in the 2000 Presidential election allowed for seven possible responses.

TABLE 1

	Random Sample	Panel Sample	Index ¹⁸
<u>Politics/Economics</u>			
Satisfied with current U.S. Policies	41%	43%	105
Favorable attitudes towards Federal Taxation to close federal budget deficit	36%	35%	97
Favorable attitudes towards tougher handgun controls	58%	61%	105
Agree that a woman should be able to obtain a legal abortion for any reason	57%	55%	96
Approve of the way George W. Bush handles his job as President	47%	49%	104
Approve of the way Laura Bush handles her job as First Lady	70%	73%	104
Identify with the Republican party	31%	33%	106
Voted for Gore in 2000 Presidential election	30%	30%	100
Consider current state of the nation's economy to be "Excellent" or "Good"	36%	37%	103
Consider current state of personal finances to be "Excellent" or "Good"	63%	65%	103
<u>Product Ownership/Usage</u>			
Personal computer located in the home	79%	81%	103
Able to access the Internet from any location	89%	88%	99
Own telephone screening device or subscribe to a service	84%	86%	102
Handguns, other than those collected or displayed, are kept in the home	24%	24%	100
<u>Shopping/Purchases</u>			
Average number of times each month something is purchased at a grocery store	7.7	7.1	92
Average number of times each month something is purchased at a drug store	2.9	2.5	86
Average number of times each month something is purchased at a department store	2.7	2.4	89
Average number of times each month something is purchased at a discount store	4.7	4.7	100
Enjoys shopping at discount or outlet stores	39%	39%	100
Uses advertising to obtain product information before purchase	23%	26%	113
Will purchase the best quality item regardless of price	42%	40%	95

TABLE 1 (Cont.)

	Random Sample	Panel Sample	Index
Describes self as one that buys on impulse	21%	18%	86
Influenced by consumer testing and reports	33%	36%	109
Willing to pay more for American-made products	44%	43%	98
Prefers to pay with a credit card rather than cash	31%	34%	110
<u>Personal Health</u>			
Consider general health to be "Excellent" or "Good"	78%	79%	101
Average number of days each week exercise at least 30 minutes	3.4	3.3	97
Consumed alcohol in any form during the past week	42%	38%	90
Smoked any cigarettes in the past week	23%	22%	96
<u>Advertising/Media/Internet Behavior</u>			
Enjoys watching commercials on television	12%	11%	92
Will delete spam or junk email without reading it	67%	68%	101
Average number of evenings spent at home during the past week	5.2	5.1	98
Average number of days in the past week where a daily newspaper was read	4.2	4.5	107
Number of hours spent watching television in an average week	16.4	16.8	102
Number of hours spent listening to the radio in an average week	11.7	11.9	102
Number of hours spent on the Internet at home in an average week	8.2	7.2	88
Number of hours spent on the Internet at work in an average week	7.7	7	91
Number of hours spent on the Internet at any other location in an average week	1.9	1.8	95
<u>Religious/Charitable Activities</u>			
Volunteered time to a charitable organization within the past year	57%	56%	98
Contributed money to a charitable organization within the past year	79%	79%	100
Attended a religious service within the past week	43%	41%	95
Considered a member of a Protestant religion	46%	49%	107
<u>Consumer Survey Participation</u>			
Average number of telephone surveys completed in the last 6 months	1.7	1.7	100
Average number of Internet surveys completed in the last 6 months	3.6	4.1	114
Average number of face-to-face surveys completed in the last 6 months	0.1	0.1	100

¹⁸ The index expresses the relationship between the results of the two sampling techniques, with 100 serving as parity. The numerator is the panel sample result while the divider is the random sample result. An index of 105 indicates that the panel sample cell was 5% more likely to agree with the statement, "I am satisfied with current U.S. policies."

Positivity Bias?

Responses from panelists are not systematically higher or lower than those from their randomly chosen counterparts. This comparison presents findings consistent with a premise that consumer panel respondents are not inclined to rate things more positively or favorably than are other respondents. Similar to Synovate’s study of ten years ago, these results suggest that a “positivity bias” should not be a concern when utilizing panelists to respond to attitudinal questions.

Dissimilar Results

Table 2 presents the five of the 50 total questions which yielded dissimilar results. Looking at this set of dissimilar responses from the two samples, it is unclear why these questions in particular fail to conform.

TABLE 2

	Random Sample	Panel Sample	Index
When thinking a year from now, will self/family be better off financially?	39%	30%	77
Have traveled outside U.S., Canada or Mexico in last two years?	20%	11%	58
Shop at a discount or outlet stores	50%	58%	116
Use coupons often to save money	32%	53%	166
Throw out sales information received in mail without reading it	44%	38%	86

The research team discussed several hypotheses to “explain” why a particular question might have yielded different results. Suggestions included “more honesty” among panelists for the first two questions, “more savvy shoppers in the panel,” for the second two questions, and a “sensitivity” among panelists to mail from the Synovate panel, coming as it does in standard bulk mailings, as an explanation for the last. Likewise, panel participation may have bolstered coupon usage, compared to random sample, suggesting that the measurement of activities specific to performance of duties for the panel may be pronounced among panelists.

All 50 questions, however, replicated those from the 1994 study by design, affording the opportunity to compare the current results with the historical relationships between the two samples on the same questions, albeit the ten years that have elapsed between the two survey periods may have significantly altered the circumstances being described. Nonetheless, in the case of percentage of respondents traveling outside the U.S., Canada, and Mexico in last two years, the 11% of panelists is the same number as recorded ten years prior for both panelist and random samples, isolating the current study’s finding of a

20% figure for random sample respondents as the potential outlier.

All questions, including these five, were also posed to Internet panelists on a third leg of this study, not discussed in its entirety here. In each of these five instances there was noticeable variation between RDD and panel. The Internet panelists’ responses were closer to those of the telephone panelists, or they effectively split the difference between the two cells being evaluated here, indicating a degree of consistency within the panel, whether fielded over the telephone or Online.¹⁹

Open-ended Questions

Scalar responses are similar across groups, but how do responses to a coded open-end question fare? Comparable results between panel and non-panel samples were also observed here, with slightly richer, fuller responses coming from panelists. Respondents were asked to rate their health on a four-point scale. Top two box scores (Excellent or “Pretty Good”) were 78% for panelists, 79% for RDD respondents (presented in Table 1). Following this question, respondents were asked open-endedly to provide substantiation for their assessments of their health ratings. Multiple answers were allowed. Panelists offered slightly more information on conditions indicating their health state (61% versus 58%), both on the good-health side (48% versus 46%) and on the bad-health side (12% versus 9%). Volunteering information about being overweight or obese was also higher among panelists (6% versus 3.6%). While neither number approached well-publicized national averages on obesity,²⁰ panelists demonstrate more of a willingness to share potentially embarrassing or sensitive information.²¹

Unaided Awareness

Clients have also questioned whether unaided awareness questions will garner adequate responses from a panel, as compared to an RDD sample. Underlying this concern is the assumption that panelists may be less engaged in the content of the survey, and more concerned about completing the telephone conversation than about responsibly answering the questions to the best of their abilities. To explore this possibility, we included a question

¹⁹ A forthcoming white paper (Research on Research Study No. 65) will compare in detail panel sample performance via telephone and Internet.

²⁰U.S. adults classifiable as obese may exceed more than 30%. Flegel, KM, Carroll, MD, Ogden, CL & Johnson, CL (2002), Prevalence and trends in obesity in U.S. adults 1999-2000. *Journal of the American Medical Association* 288, 1723-1727.

²¹ Online panelists proved to be even more forthright. 11.1% of Internet respondents self-reported overweight/obesity issues, indicating more candor owing to a combination of panel comfort, coupled with the elimination of interviewer presence Online. Consistent with this is a significant increase in self-reporting of depression Online.

asking respondents to list all of the sponsors/advertisers they could remember from the recently completed 2004 Summer Olympics in Athens, Greece. Panelists and their RDD counterparts typically came up with similar levels of recall across the various categories, as shown in Table 3.

TABLE 3

	Random Sample	Panel Sample
Soft drinks	7%	9%
Athletic Shoes	5%	4%
Credit Cards	5%	4%
Car Companies	4%	4%
Phone Companies	3%	2%
Breweries	1%	2%
Retailers	2%	1%

On Professional Respondents

One of the concerns articulated occasionally about using panel sample is their alleged “professionalism,” related to the (unfounded) suspicion that panelists will cut corners in their haste to complete the task, while “fresh” randomly chosen respondents will not. Professionals, it is argued, will rush through a telephone survey, clipping their answers, not waiting for all choice options to be read, not paying attention to instructions, restricting their use of open-ends, and generally heading off any indication of follow-up questioning that might extend the interview. The amount of time taken for the average interview, conducted from the same Synovate-based phone center, however, was statistically equal across the two groups (16.2 minutes for the panel cell, 15.9 minutes for the RDD cell).

Chi Square and T-Testing

Some marketing decisions depend on the spread of data and also on covariation (e.g. for driver analyses, positioning analyses and modeling preferences). Therefore, chi square tests were conducted on fifteen Table 1 questions on rating scales and number-of-days-in-week activities to compare entire distributions of responses. Results revealed statistically equivalent distributions on ten cases. A t-test to compare means resulted in 13 of 15 cases where the means line up. One of the failed mean cases also failed the chi square test; the other case had passed chi square testing.

Demographics

Overall, the demographic profile of participants from the panel matched the RDD on 11 of 14 key variables: gender, age, household income, education, employment status, household size, presence and ages of children, primary grocery shopper, U.S. census region, and internet access.

Marital status was one the three demographics which did not match. ‘Married’ was higher for panel, although elevated relative to U.S. census for both respondent groups. One hypothesis is that married couples provide two ways to complete a telephone survey by telephone into a household, whereas single adults will on balance be harder to reach. Home owners were also more likely to be included in the panel composition, possibly due to life-stage attainment which, as with marital status, would make them more reachable than their counterparts who rent. Again, both samples exceeded U.S. census projections for home ownership.

Race/ethnicity, the third of the three demographic factors to show a significant difference, is the most difficult and time-consuming demographic quota for general population panel operators to fill through normal service. Using the TeleNation service, as we did to conduct this study, restricted time in the field by design to three days. While Hispanics and African-Americans were underrepresented in the panel sample relative to the RDD sample, neither sample approached the U.S. census estimates. Neither RDD nor panel operations for this study included an overquota for racial/ethnic groups (in Spanish as well as English for Hispanics). This requirement could have materially improved representation, but was beyond the design requirements for this comparison.

Summary Discussion

One can conclude on the basis of reviewing all of the above information that consumer household panelists are as acceptable as randomly selected respondents for engagement in traditional ad hoc custom consumer telephone studies.

Panel sample provision is as appropriate for ad hoc telephone custom research study as is RDD. This present research confirms those findings of the 1988 and 1994 studies and adds support for panel sample creation by looking carefully at open-ends and unaided awareness drills, two areas not previously investigated. Note that telephone-fielding methodology itself is not being evaluated relative to other options, which is a topic for future research.²²

The fact that RDD research has become increasingly expensive and difficult to accomplish, as is generally recognized throughout the research industry, lends operational support for usage of panel whenever possible. The increasing difficulty of raising a voluntary random sample has driven the need for supportive research, such

²² The present study compares two telephone cells of a three cell study, the third cell conducted via the Internet. A complete analysis of all three cells is forthcoming in Research on Research No. 65.

as the present effort.²³ The compelling operational benefits of panel sample do not *in themselves* sway this recommendation in the face of countervailing data. The data, rather, confirm that the scalars will line up. This assures similar survey results, and, by extension, similar business decisions based on similar understandings of panelists-as-consumers when applying inferences from them to consumers in the larger population from which they were impaneled.

Some of the mounting difficulties impeding RDD research include those related to increased telephone call monitoring (“caller id”), ubiquitous telephone answering machines intercepting unsolicited sales calls (“junk calls”) and the advent of “landline-less” mobile telephone subscribers, especially among younger people. Mobile phones are off-limits for unsolicited research calls.²⁴ Additionally, some upscale households have more land lines for dedicated users that provide more opportunities for random methodological selection unless additional control steps are taken.

RDD and Panel approaches both have their strengths and limitations, some shared, some unique. Panelists are generally compensated for their time, though not always for telephone research, and they were not for this study. Randomly chosen respondents are not compensated. Are panelists atypical of the general population because they have agreed to join a panel and may be motivated by incentives to participate in a series of studies, for which they may be compensated? Or, on the other hand, are RDD participants somehow “different” by agreeing to participate for free in custom research studies conducted by total strangers? “Do Not Call” legislation is more of an issue for non-panelists who occasionally challenge interviewers to explain that the call is perfectly legal, coming as it does from a market research company, which is not selling anything.

These limiting factors appear to negate one another. In one scenario, failures to incorporate certain classes of individuals in non-panel studies may be offset or masked by a differing scalar behavior among panelists. Such exploration may well be a topic for future research. Answers to these questions, interesting as they may be, will not likely prove relevant to improving the business decision-making process for end clients.

The present research describes a comfortable equivalence between RDD and Panel approaches, based

on comparability of results. We raise this discussion of the uncertain validity of either approach simply to point out the complexity of the challenge beyond the surface inter-reliability that has been established by definitive research time and again. Further, we note the continuing interdependence of RDD and panel sample approaches as essential co-partners for further research exploring the veracity and appropriateness of studies built on one or the other approach.

Finally, this exercise demonstrates the value of one sampling approach serving to identify the assumptions embedded in another. Of course, the burden of proof of superiority typically rests with the newer approach.

This dynamic is evident on the custom side in the move from non-panel to panel sampling, gradual as it has been over the past 65 years. The migration towards panel has clearly accelerated now through the twin dynamics of the dramatic contributions of Online research coupled with advances in telecommunications technology that make random consumers harder to reach.

Closer inspection of both sets of data invariably reveals, however, as it does in this case of random versus panel sample provision, that the onus of explaining the different results of the two approaches does not reside entirely on one side or the other. One side cannot “account” for all the differences, nor can the other side claim to be the sole arbiter of truth. Fortunately for the study at hand, similarities outweigh differences, paving the way for impaneled respondents to continue to contribute to consumer knowledge in a large way. The recommended movement to panel-based solutions is strengthened all the more, given the inevitable trend toward further erosion in random methodology in the near future, with a concomitant increase in operational adjustments necessary to make random sampling ‘work’ at all.

Principal Authors: Lawrence Fisher, Ph.D.
(larry.fisher@synovate.com) and Norman Kane, MBA
(norm.kane@synovate.com), Synovate Inc., 222 S. Riverside
Plaza, Chicago IL USA 60606.

© 2004, Synovate, Inc. All rights reserved.

²³ The notoriously unreliable forecasts predicting the outcome of the November 2, 2004 U.S. Presidential election brought some polling issues using random samples into the national spotlight (see “Business Polling is a Different Beast,” Seattle Post-Intelligencer, November 9, 2003, for a summary discussion).

²⁴ Random telephone lists are typically procured from clearing houses, then ‘scrubbed’ to eliminate mobile telephone numbers. Use of ‘predictive dialers’ that route a connected call to an open interviewer can fail 1½% to 2% of the time. The cost of these completed calls would be borne by the mobile phone subscriber, hence the policy to exclude them from the sample.