

RESEARCHING THE MOST PROMINENT AND INFLUENTIAL: INTERNATIONAL COMPARISONS

Brian Shields, International Herald Tribune
Anne Brummell, Ipsos-RSL

“The road up and the road down are one and the same.”
 Heraclitus

This paper will look at two similarly shaped surveys that were conducted on either side of the Atlantic. The 2000-2001 Opinion Leaders Survey [US] was conducted between May and September 2000. The first European Opinion Leaders Survey (EOLS) was conducted and published in 2000, and is being updated again this year with fieldwork spanning May to September, with results available in late October. The authors of this paper were responsible for the design and expediting of EOLS.

This paper will look at the comparative treatments of researching the most prominent and influential, or ‘the great and the good’ as they might be called, in Europe and the US. We will examine how EOLS has attempted to increase response rate from the first in the series to the second, while we will see how Opinion Leaders [US] achieves a 50+% response rate without seemingly devoting much effort to the issue. We will go on to look at how response rates compare for these surveys with others having broader universes in their respective regions.

Whilst there is no shortage in Europe of international research that looks to investigate the reading, business and behavioural characteristics of Europe’s leading income earners, the last few years have witnessed an increasing demand for information from those clients and their agencies who are targeting ‘opinion leaders’ or ‘opinion formers’. By the latter, advertisers invariably are seeking to reach those at the very pinnacle of position and influence across a variety of sectors: business, government, non-governmental organisations, the media and academia.

EOLS was designed to investigate those that otherwise fail to show up in significant numbers in any of the current research studies. We take the background and mission of Opinion Leaders [US] to be the same; interestingly though, the move for advertisers to target ‘opinion leaders’, and hence media owners’ response to provide data in this area, arrived much sooner in the US than in Europe.

In constructing EOLS - and from what can be gathered from the technical appendix of OL [US] the same was true there - the universe composition was not compromised by issues of response rate or sampling. There were clearly to be challenges in surveying a ‘difficult to research universe’, but these were to be faced rather than be diluted by pulling methodological or definition punches. Generally speaking the contentious or problematic areas were:

- Definition (who are opinion leaders?)
- Sampling (how to get fair representation and balance between those representative of pertinent fields?)
- Response rates (how do you get the prominent and most influential to respond to self-completion questionnaires when response rates for the more humble are falling ubiquitously worldwide?)
- Depth and quality of information that these respondents would give.

EOLS and OL [US] did not take radically different approaches as to who should be surveyed, though the former faced additional problems in that the survey was to be conducted across 17 countries and OL [US] was confined to one - albeit a very large one.

OL [US] took as a working definition, which sample-frames would then be selected to be supportive of, those that have, ‘a position that either affects and shapes policy and opinions, or personal/professional accomplishments, activities and responsibilities that mark these individuals as noteworthy’. EOLS worked on the basis of surveying those ‘at the very pinnacle of position and influence across a variety of sectors’. Both produced a mix of government, business, academia (called education in OL [US]), arts, media, law, science and medicine. Table 1 gives the main sample-frames for both surveys.

TABLE 1

<u>EOLS</u>	<u>OL [US]</u>
International Who's Who 2000	Who's Who in America
Duns Global Marketing Database	Federal Yellow Book
Fortune Global 500	Congressional Yellow Book
www.europa.eu (EU government website)	Carroll's State, Municipal and County Directories
Europa World Year Book	
European Advertising and Media Year Book	

For EOLS, the assumption was that whilst the definition was somewhat arbitrary, those it contained within it were the opinion leaders that advertisers sought to address. (Which does not mean that all opinion leaders were necessarily represented). And, as a corollary of this, they were representative and reflective of any wider opinion leading community. The litmus of this was the number who claimed 'opinion leading' activity or had engaged actively in certain 'areas of influence'. (These were split between Government and self-regulation of certain industries e.g., Food, Automotive, Banking/Finance, Pharmaceutical/Healthcare, Petroleum products and 'other' areas e.g., Biotechnology, Disaster Relief, Military Defence policy, Telecommunication policy, International trade. Across the two sections there was a total of 26 areas of potential influence.)

For EOLS the levels of involvement were: a) ever professionally advised or interacted with public officials, reporters/media, or investment fund managers in relation to the areas listed, b) discussed informally with representatives of governments, press/media or investment funds (same list applied), c) your knowledge and experience is such that others seek your advise and opinions about them (same list). Only 2% ticked the option 'none of these'.

OL [US] took a slightly different approach, and one that EOLS 2001 has moved closer toward. For a similar, but longer, list of 'areas of influence' respondents were asked whether they: a) as part of your job or professional responsibilities, which of the following issues are you now actively involved or have been in the past year, b) as part of your professional interests, which of these issues are you now actively involved or have been in the past year. Only 0.1% of those responding failed to answer positively to any of the issues listed.

Another important issue for both surveys was the level and detail of information that could be asked of such respondents. Clearly the nature and scope, and the end use, of the survey precluded asking questions of income, general consumer and business behaviour. They were neither relevant nor would they illicit response. Essentially both surveys were about media consumption and, very importantly, the values the respondents attached to certain media. EOLS faced the challenge of asking about print media available in 17 European counties, while OL [US] sought to measure both print and TV (EOLS eschewed the latter).

Not untypically, the European survey adopted questions that would provide measures of average issue readership (as gathered on recency claims) as well as frequency on the range of, regularly, often and sometimes. OL [US] measures readership only on the variables of 'read regularly' and 'read occasionally', while for TV 'read' became 'view'. The latter approach obviously lends itself less to later iterative reach and frequency analyses.

However, both surveys employed measures that, aside from regularity of reading (or viewing), assess the value attached to any given medium. The thinking being that in both surveys we have individuals who have a high media exposure, but exposure itself is not the only dimension which an advertiser may wish to consider relevant in placing an advertising communication. OL [US] employs the measures of 'influential', 'objective', 'keeps me current', 'credible' and 'enjoyable'. EOLS used 'influential', 'credible' and 'keeps me informed'. An example from each of EOLS 2000 and OL [US] demonstrates some of the variation between average issue reading (regular/occasional from OL [US]) and the qualitative measures for a selection of titles. See Tables 2 and 3.

TABLE 2

	<u>EOLS 2000</u>		
	AIR* (%)	Credible* (%)	Keeps Me Informed* (%)
Financial Times	32	19	22
International Herald Tribune	24	20	19
Economist	30	15	17
TIME	19	11	18

* Expressed as percentage of all respondents to the survey

Base: All respondents
 Sample: 2,420

TABLE 3

	<u>OL [US]</u>		
	Total Readership* (%)	Influential** (%)	Objective** (%)
New York Times	58	70	50
Washington Post	31	62	33
USA Today	49	20	28
Economist	22	56	44
BusinessWeek	34	33	40

* Aggregate of regular and occasional

** As percentage of those claiming regular/occasional readership for a particular title

Base: All respondents

Sample: 1,573

For those responsible for designing and conducting EOLS, the greatest worry was about the response rate - to the extent that before fieldwork began there was concern about achieving a degree of return that could allow for publication with credible representation of the defined universe. On the other hand OL [US] managed, by European or international research standards, a response rate that was enviable with, seemingly, much less in the way of overt effort to achieve it.

OL [US], with a two wave mailing and with only a dollar being donated to one of a list of five charities, achieved a response rate of 52.4%. It should be noted for comparisons with EOLS that no monetary incentive was enclosed with the questionnaire and covering letter (the dollar being donated only for those completing the questionnaire). There were no so called 'friendly' or stimulating lead-in questions and the questionnaire, four sides, was densely packed with page one asking involvement in around 100 issue areas, page two a print media page with seven heading across the page and 38 media as rows. Page three was more print media - around 40 with again seven columns. The fourth page, in a similar format to the print media pages, asked of viewing of around 40 different programmes. By European standards this was a survey of minimal incentive with a dense and not overtly visually appealing questionnaire, which was repetitive in nature, with no obvious objective beyond measuring media consumption, and was printed only in black and white. Yet, in only two waves, it achieved a response rate that we regard as exceptional. On top of this, **each** of the sample-frames used in the survey generated a response rate in excess of 50%.

EOLS 2000 experience was somewhat different.

For EOLS, we sent every potential respondent a personalised letter with the questionnaire, outlining the reasons we were sending them a questionnaire and explaining that we regarded them as one of the leading figures in their field, and that we were interested in their views and opinions on certain topics, as well as their media consumption.

The questionnaire was designed to reflect the objective of soliciting their views on major contemporary issues and for this reason, the whole of the first page of the questionnaire was devoted to a series of statements on various topics, such as defence, genetically modified foods, economics and the environment, which we believed would be of interest to respondents and would stimulate their interest and persuade them to fill in the questionnaire. From this, we moved onto their readership of newspapers and magazines (average issue readership, frequency of reading and the three additional measures of 'influential', 'credible' and 'keeps me well informed') and then to questions about the areas in which they have influence. The EOLS questionnaires were printed on four sides and in colour to increase the appeal of the questionnaire, whereas the OL [US] questionnaires were just printed in black and white.

Based on experience of other surveys, live monetary incentives were used in all the EOLS 2000 mailout packages in order to enhance response. A mint condition US dollar was enclosed with the questionnaire and covering letter in the first wave. This was presented to the respondents as 'a token of appreciation, which they may wish to donate to a charity of their choice'. The reminder mailings used a range of local currency incentives, all of which were at least double the value of one US dollar. (The one exception to this is Luxembourg where a dollar was used in the reminder mailing as a small local currency note was not available for use).

As an additional incentive, respondents were offered a summary of results to be mailed after analysis of all the questionnaires. A total of 10% of respondents requested the summary and those people sampled from the International Who's Who were the most interested in this summary.

Rightly or wrongly we were moderately pleased with our 33.3% response rate for EOLS 2000. Aware that survey timings and logistics, and a desire to get the survey into the market in November 2000, had prevented a third wave, EOLS 2001 was designed to allow for three waves. Further initiatives were implemented with a view to increasing response rates.

The first EOLS had live monetary incentives in the mailout package, so there was no reason for those mailed to actually return the questionnaire, apart from a sense of obligation, having actually received the cash incentive without actually doing anything. For EOLS 2001, we donate a further US dollar to charity for every completed questionnaire that we receive, as an additional incentive. Respondents can pick which one of three charities they would like their dollar to go to.

As fieldwork is still in progress at the time of writing, we are unable to give a full account of the extent to which these additional measures have proved effective. We will be able to give more information on this in the verbal paper, when fieldwork will have been completed. However, for the purposes of this written paper we tentatively project, on the basis of returns thus far compared with a similar stage for EOLS 2000, that we will end with a response rate for EOLS 2001 of between 38-40%: a significant improvement over the previous survey (33.3%).

To compare response rates between EOLS and OL [US] is a humbling experience for those involved in the production of EOLS; to explain them in other than through nation/cultural reasons, is harder still.

On the credit side EOLS has, in our opinion, better incentives, a less intimidating and more varied and interesting questionnaire. The accuracy of the sample-frames we take to be at least as good as for OL [US]. For example, the business sample involved phoning each of the largest 750 companies around Europe and getting the names and exact titles for the two most senior executives. In other cases government websites were used and the International Who's Who is operated on the same principles as Who's Who in America. On the debit side EOLS questionnaires were produced in only five language versions (English, German, French, Italian and Spanish). However, many of those nationals who were sent an English language version of the questionnaire, but who were not English mother tongue, gave higher than average responses (Denmark, Sweden, Finland and the Netherlands). In two countries this was not the case - Greece and Portugal - but given the small percentage of the total that they account for, this cannot be used as an overall explaining variable. It is difficult therefore to point to a research or methodological reason for a comparatively poor response rate in Europe than in the US, amongst an essentially similar grouping.

In the European context the Danes, Swedes and Finns almost always generate a higher response rate than is true for Europe as a whole. At the other end of the scale come the Italians, Germans and increasingly the French and British. So too, perhaps it is that Americans - irrespective of their status - are more likely to respond to market/media research than, taken as a whole, are their European counter-parts. Perhaps a more germane question is whether these supposedly hard to research individuals - the most prominent and influential - really are more difficult to generate response from, or to ask reasonable questions of, than a broader public at large within their own national or continental context.

In order to test this, we have compared the EOLS 2000 survey with the European Business Readership Survey 2000 (EBRS 2000) that collects information about Europe's business elite. EBRS covers industrial, commercial and financial establishments in the same 17 countries as EOLS. All eligible establishments are telephoned in order to gather the names of the heads of certain job functions (such as the Chief Executive, Head of Finance, Head of Marketing etc). This telephone stage not only records the names of those in the selected job functions, but also gathers information on how the person should be addressed and for multi-language countries, which language they prefer to be addressed in. Each selected individual is sent a questionnaire and covering letter in their own language and there were three language versions for Belgium, two for Luxembourg and three for Switzerland.

EBRS also uses live incentives in the mailout package. For the first two waves, a mint condition US dollar is sent with the questionnaire. For the subsequent waves, a range of local currency incentives were used, or another US dollar.

In both surveys there are differences in response rates by country. In order to provide some valid comparisons, we looked at the response rate, by country, after two mailings on EBRS, as EOLS 2000 did not have a third wave of mailings. If you examine the seven EOLS countries that received a questionnaire in the local language (Austria, France, Germany, Ireland, Italy, Spain and United Kingdom), the response rate is 32.6% and a very close 33.3% on EBRS. Add in Denmark, Finland, Sweden and the Netherlands, who are at the top end of the response scale, even if not addressed in their mother tongue and the response rate becomes an identical 33.5% on EOLS **and** EBRS.

Although it can be argued that EBRS works harder to achieve the response rate on EBRS as more establishments are telephone screened and more local language questionnaire versions are produced, the response rate of EBRS after two waves is 34.4% compared with EOLS 2000's final response rate of 33.3%. From this it can be seen that

differences in response between European opinion leaders and Europe's leading businessmen is not that substantial, in this instance. The final response rate on EBRS 2000 was 43.3% after additional mailings. We will update you in the verbal paper in Venice on how the three wave EOLS 2001 compares with this figure for countries receiving their own language versions.

Turning to the United States, is it that much harder to generate response from the upper echelons than it is from a wider population? If we assume that in questionnaire terms we are **not** comparing exactly like with like - then we can look at response rates for OL [US] against a survey with a similar methodology. By strictly like with like, we mean that for opinion leaders in the US it would never be attempted to send a sixteen-page questionnaire that sought answers to all manner of behavioural/domestic and consumer activity. This does not invalidate response rate comparisons, for different surveys set themselves different informational objectives, but in doing so we are cognisant of the need to provide a representative sample on which to report findings. This in turn involves, in part, the response rate generated.

For the purposes of comparison we shall look at OL [US] and The Mendelsohn Affluent Survey 2000. The latter looks at head of households within households of incomes of US\$75,000+. The method of administration, like OL [US], was a self-completion postal questionnaire.

The initial mailing for the survey was 42,000 **prospective** affluent heads of household across all 50 states plus Washington D.C. A list of names and addresses was drawn for Mendelsohn Media Research by Survey Sampling Inc., using Donnelley Marketing's quarterly updated 'Family INcome Detector' (FIND) model. The Donnelley procedure utilises multiple regression analysis to apply a predicted income level to the individual records in the Donnelley file. The procedure is applied to a national probability sample to increase the likelihood of reaching upper income households. The incentives used were mint condition US\$5 or \$10 bills. The questionnaire was 16 pages in length and covered media consumption, general consumer, investment and travel related behaviour, as well as detailed demographic information.

The overall response rate for Mendelsohn 2000 is given as 55%, but this figure refers to all responses received and is related to the 40,282 adults to whom the materials could be delivered. The survey reports on the results of 12,650 completed questionnaires from heads of households with incomes of US\$75,000+. We take it that the discrepancy (55% of 40,282 is 22,125) is accounted for by removing from the reporting stage those with ineligible income levels. Therefore, while the response rate overall is 55%, the response rate amongst those with incomes of US\$75,000+ is unknown. It is fair to say that the likely response is at a maximum of 55% and in reality is probably somewhat lower (normally as income levels rise for surveys of this type, so response rate falls). A guess would be that the response rate is in the range of 50-54%, and that this might still be generous.

The response rate given for OL [US] was 52.4% - or almost the midway point in the estimated range for Mendelsohn Affluent Survey 2000 for those with a household income of US\$75,000. Now the methodologies are somewhat different, certainly with respect to the type of sample-frames used, so too are incentives and questionnaires.

Although the studies compared do differ, the response rates do bear comparison, and the comparison is one that suggests that the 'great and the good' are no harder to research - in the US or Europe - than those with merely decent incomes or are well positioned in the European business arena. Moving the research focus up the power and influence scale does not necessarily imply moving down the response rate gauge.

As equally axiomatic, however, is that pan-European research is not likely to approach the response rate levels achievable in the US for surveys of a similar scope and methodology. Nor is this simply a results of conducting research across borders - only one or two individual European countries, those of Denmark and Sweden, ever come close to US levels of response. And the gap is not just statistically significant; it is enormous. The only conclusions on the differential response rate between Europe (and we could add in Asia) and the US - particularly in the light of the respective measures taken on EOLS 2000/1 and Opinion Leaders [US] - is that there is a nationally higher pre-disposition to respond to surveys on the Western side of the Atlantic. The best hope for the European researcher to enjoy higher response rates, and probably less expense in achieving them, is to apply for a Green Card.

Ipsos-RSL **Survey of Influential Figures in Europe 2001**

1 Please indicate how strongly you agree or disagree with each of the following statements. CC1

	Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	
It is time to rethink the war on drugs and move in the direction of careful legalisation of addictive narcotics	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(17)
Genetic cloning is a venture driven by economic motives rather than by medical or social ones	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
In the area of genetic food modification, governments and corporations must avoid new technologies until they are proven positively safe, as opposed to using them if they have simply not been shown to be harmful	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
The threat of terrorism with weapons of mass destruction is greater than it was five years ago	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(15)
Europe will be well served by its own common defence policy rather than rely primarily upon NATO for defence	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
The pendulum in the Western world has swung too far away from government regulation and toward laissez-faire	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
Europe will be strong enough to weather the American economic jitters and continue to enjoy economic growth	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(16)
The Euro is fundamentally strong and will eventually play an important global role as a reserve currency	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
Most European countries cannot afford to maintain their current state-funded pension schemes at current benefit levels	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
It is fair for the public to hold private corporations accountable for achieving high environmental standards, even if it costs the shareholders money	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(21)
Companies that publish detailed environmental reports, which have been verified by an independent third party, will be rewarded by investors for that behaviour	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
The public's distrust of what private companies will do to their food, or put in products sold to consumers, makes it vital for multinational corporations to earn public trust with clear communication and clear standards	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
Companies who articulate their standards and values clearly and early can influence the public's attitude toward them and their products	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(24)
In the move to globalisation, those who act quickly to establish and explain their standards will benefit, while those who remain silent or react only after a crisis will put themselves at risk	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
The single biggest impediment to development in most Third World countries is systemic corruption in government and business	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
The digital age will create an underclass of those who do not have access	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(27)
The Internet will never replace newspapers as a reliable news medium	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
Information technology will make it virtually impossible to enforce copyright laws	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
All advertising specifically targeted at children should be banned	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	(30)