

# GRIT Consumer Participation in Research Report

A Global Study of Fresh vs. Frequent Survey Takers

GREENBOOK.



Greenbook/RIWI Corp. Publication

[www.greenbook.org/GRIT/CPR](http://www.greenbook.org/GRIT/CPR)



## Contacts

**Leonard F. Murphy**

Chief Editor & Principal Consultant  
(770) 985-4904  
lmurphy@greenbook.org

**Lukas Pospichal**

Managing Director  
(212) 849-2753  
lpospichal@greenbook.org

**Diane Liebenson**

Publisher, GreenBook  
(310) 545-0918  
dliebenson@greenbook.org

**Eric Meerkamper**

President, Global Operations  
and Chief of Staff, RIWI Corp.  
(416) 205-9984  
eric@riwi.com

## GreenBook

New York AMA Communication Services Inc.  
116 East 27th Street, Floor 6  
New York, NY 10016

# Table of Contents

2	2014 GRIT Consumer Participation
2	Editor's Note
4	Introduction
4	How the data were collected
6	Key findings for GRIT CPR 2014
6	CPR 'Freshness' distribution across 55 countries
7	CPR 'Freshness' distribution across gender
8	CPR 'Freshness' distribution across age groups
9	Global perceptions of free elections: fresh vs. frequent responders
10	Global perceptions of happiness: fresh vs. frequent responders
11	Global tablet purchase intent: fresh vs. frequent responders
12	Mobile phone gaming: fresh vs. frequent responders
13	Country Level Analysis
13	Online purchase comfort: fresh vs. frequent responders
14	Country Level - Never Purchased online: fresh vs. frequent responders
15	Country Level - Online purchase comfort: fresh vs. frequent responders
16	ADDENDUM
16	About The RIWI Corporation
16	Study-specific considerations for GRIT CPR 2014
17	CPR Age distribution across 55 countries
18	CPR Gender distribution across 55 countries

# 2014 GRIT Consumer Participation

## Editor's Note

Respondents are the lifeblood of market research. Whether it's qual or quant, surveys or communities, neuromarketing or 'Big Data' and everything in between knowing how to reach, engage, and understand people is the very bedrock of insights.

In our interconnected world, achieving that goal is in some ways easier, and in many more ways more difficult. Until now, little data have existed to help researchers understand this basic question: how do we get consumers to engage with us and what do those folks look like?

Now in its second year, the GRIT Consumer Participation in Research (CPR) report is our effort to answer the who, what, when, where, and why of global consumer participation.



## GRIT CPR 2014

55 countries

15 languages

50,000+ respondents

GRIT CPR is the tool that researchers can use to benchmark their own efforts in over 50 countries and start crafting new strategies to grow this vital resource: consumer participation.

The 2014 GRIT Consumer Participation in Research Report sets out to provide input into several important questions:

- » Are "Frequent Responders" categorically different from "Fresh Responders", and, if so, in what ways? Does this matter? Why?
- » Is the difference significant enough that it should be of concern, or be of strategic benefit, to different stakeholders in the research process?
- » Do the differences necessitate a form of 'data triangulation' whereby customers need to receive a blend of respondents, some "fresh", and some less so? Or should all respondents be "fresh"? Why?
- » Is there a confounding factor at play? If a majority of all responders online share a more dominant characteristic about which we do not know, such as intellectual curiosity (no matter how frequently they answer a survey), how much weight should we assign to the "freshness" findings shown here?
- » The people who were intercepted are likely somewhat biased toward heavier Web users. Since one can make this same observation of all Web-based respondent data capture modalities, does this matter? Why?
- » What are the implications that need to be addressed as an industry from these findings, specifically, for those who make data-based decisions?

Although this isn't meant to address all issues related to research participation, it is meant to be an evenhanded and objective view of the differences between those who do not normally participate in research and those who do. It's an important distinction, and although convenience samples are the norm for much commercial research, for public policy or social research, especially in emerging markets or for hard to reach populations, finding new ways to engage with random samples is exceedingly important.

Thank you to our friends at The RIWI Corporation (RIWI), who completed the data capture, analysis, and report writing. We're beginning to get a picture of what these populations look like, and together, we are excited to share the GRIT CPR with the entire industry.



---

We have relied too heavily on the same respondents for too long, and we need to embrace innovative and new ways to understand people.

– Dan Foreman, Past President, ESOMAR

# Introduction

Web-based market research and new, related fields of data collection online are experiencing rapid innovation. The meteoric rise of mobile, nano/micro-surveys, text analytics and other technologies are providing insights professionals and data scientists with methods to engage previously unengaged populations. At the same time, market researchers are still heavily reliant on data collected from members of consumer research panels and other online communities to obtain bespoke insights. It is for this reason that we wanted to examine, in the 2014 GRIT Consumer Participation in Research Report, one question: **To what extent, if any, does the frequency of a respondent's survey taking have on the answers given?**

Our scope of analysis comprised 50,313 respondents from 55 countries, and covered 15 languages. We asked a randomized battery of 20 questions, ranging from opinions on political freedoms to online purchasing patterns, to opinions on the use of social media. The pivotal question we used to cut and analyze the data by was the following:

The response to this question does not indicate the number of surveys someone has taken, but rather the interval between the current survey and the last one in which that individual had participated. Separating 'past day/week/month' survey takers (Group 1) from those having responded in 'over a month/never' (Group 2) gives us a proxy for frequent survey takers versus those who seldom choose to participate in research. Roughly 72 percent of the respondents (36,351) reported that they had not taken a survey in over a month or have never taken a survey, i.e., they are "fresh responders". The remaining 28 percent (13,962) had answered a survey within the past month or more recently, a group we call "frequent responders".

This segmentation of the respondent populations appears to be meaningful. For 19 of the 20 questions asked, there was a statistically significant difference in answer distribution between the responses of the "fresh responders" and the responses of the "frequent responders". There was also statistically significant difference between these two groups at the answer level within 19 of the 20 questions.

## Prior to this survey, when was the last time you answered survey questions?

Past day	8%
Past week	9%
Past month	11%
Over a month	25%
Never	47%

## How the data were collected

We employed RIWI's **Random Domain Intercept Technology (RDIT™)**, an all-device survey technology platform capable of randomly intercepting online survey respondents in every Web-enabled country and territory in the world. When users navigate the Web by typing into the URL bar, they may reach an Internet destination which they do not intend to reach. When mistakes occur, such as mistypes on non-trademarked URLs or other input errors made by the user during this process, users commonly land on sites that deliver ads or land on non-existent sites (e.g. "this page does not exist") or lapsed or 'parked' adomains (i.e., those reserved for future use). RDIT patents and processes access that global flow of direct navigation users and filter this stream through

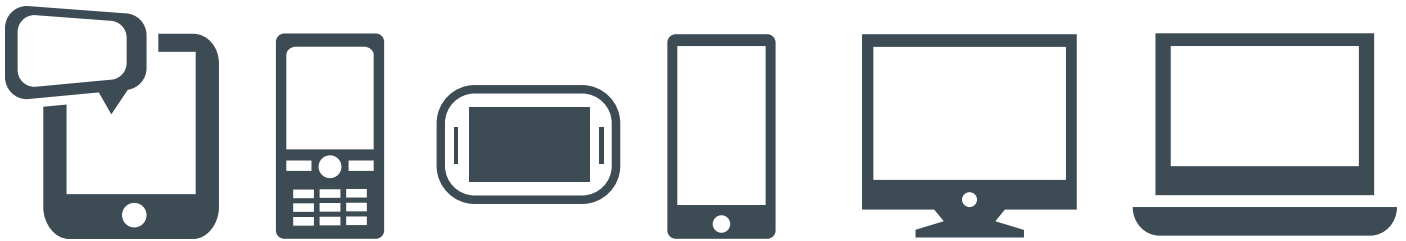
a suite of tests that cleans for 'bots', acquires country codes and IP locations, chooses an applicable language and delivers the appropriate survey to a mirror of the Web-using public.

RDIT software delivered surveys to all devices including smartphones, tablets and desktops on all operating systems. The surveys were delivered in full screen format, allowing for maximum readability on smartphones and tablets. This method results in a global response rate of approximately ten percent. Completion rates were much lower, as the 20 randomized question format was designed for people to answer only as many questions as they wished; no incentive to respond was offered.

---

## Random Domain Intercept Technology

randomly intercepts online survey respondents in every country in the world on all Web-enabled devices

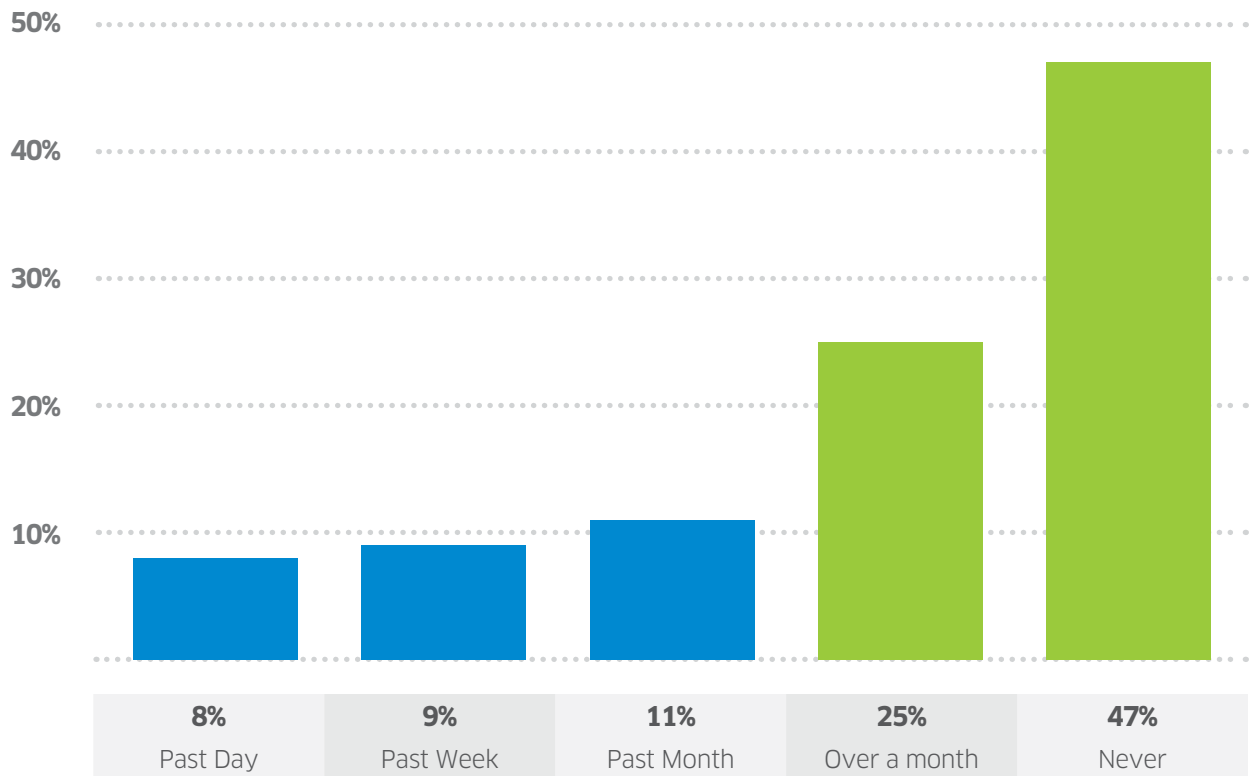


For the relative breakdown of the type of respondent (e.g., approximately 20 percent of surveys were collected on mobile devices such as smartphones and tablets) accessed through the RDIT system globally, readers may see GRIT CPR 2013.

# Key findings for GRIT CPR 2014

Figure 1: CPR 'Freshness' distribution across 55 countries

Prior to this survey, when was the last time you answered survey questions? (N = 50,313)



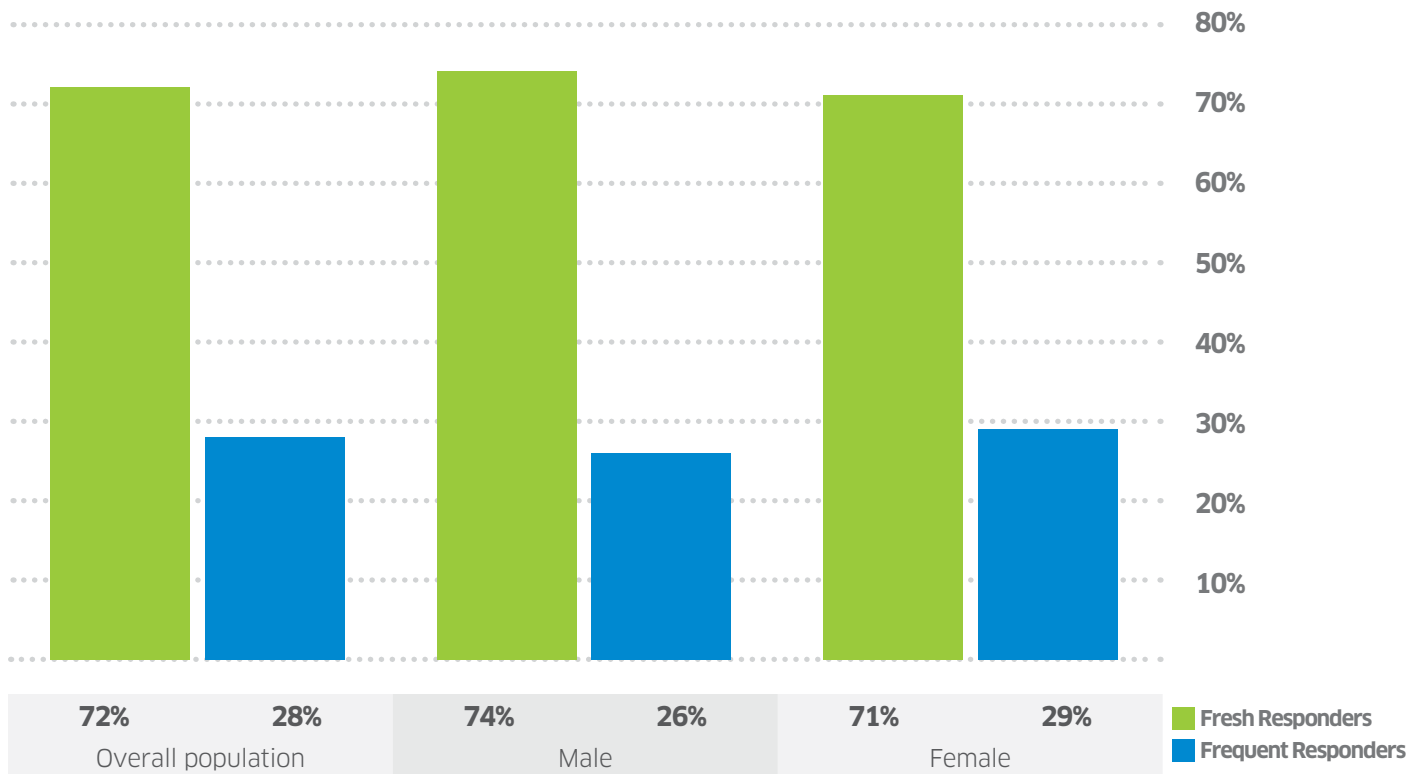
A "fresh" responder, is, for purposes of this study, defined as one who has not completed a survey in over a month prior to being questioned in GRIT CPR 2014.

This question shows that more than 70 percent of our respondents globally had not completed a survey in a month or longer. We defined this sub-grouping of respondents as "fresh responders" and the other grouping, less than 30 percent, as "frequent" survey responders. This 70-30 split is consistent with GRIT CPR 2013, which had conducted more than 160,000 interviews globally in over 190 countries and territories.



## Figure 2: CPR 'Freshness' distribution across gender

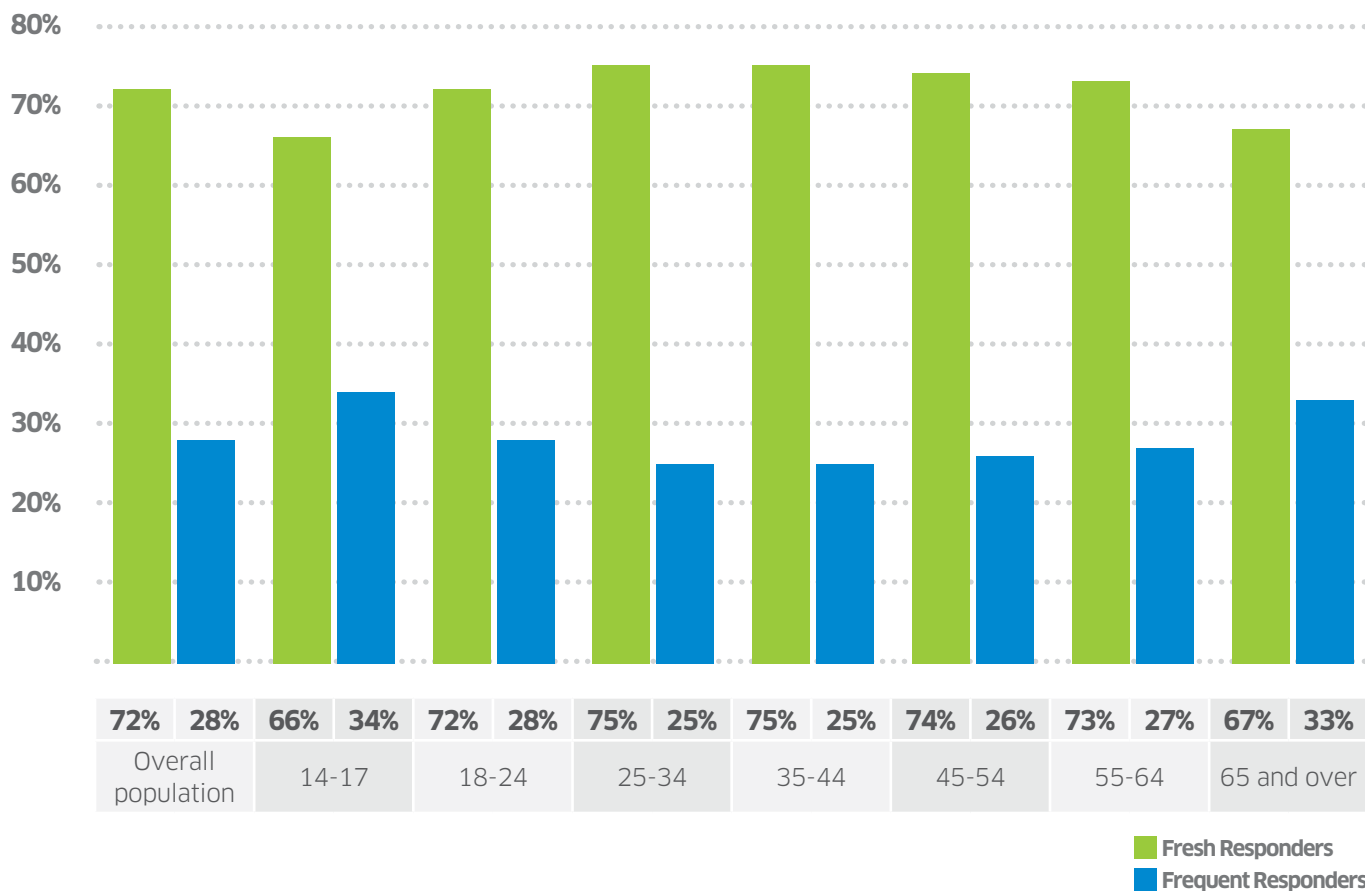
What is your age and gender? (N = 50,313)



Females were slightly more frequent responders compared to males across the global population.

### Figure 3: CPR 'Freshness' distribution across age groups

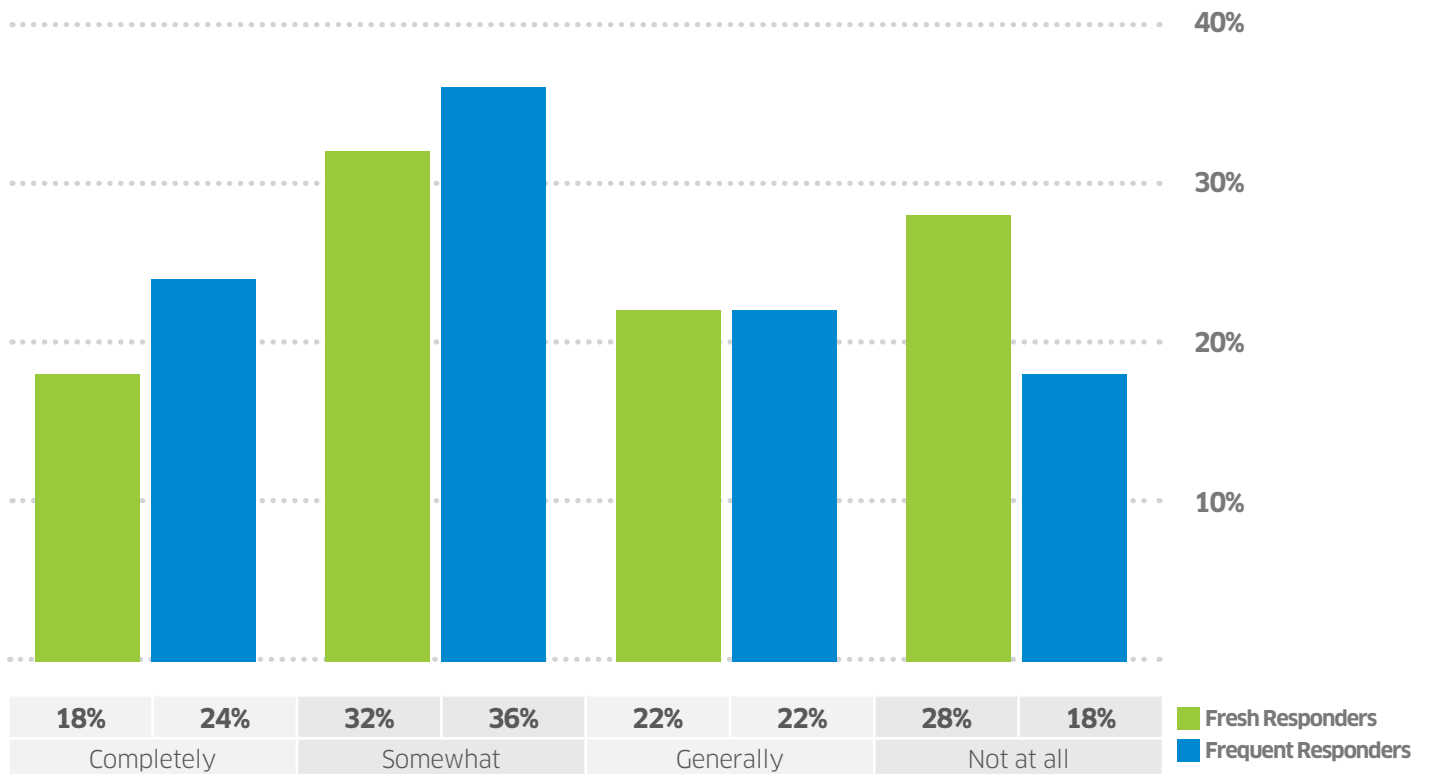
What is your age and gender? (N = 50,313)



There were only minor variations across age groups with 14-17 year olds and 65+ being slightly more frequent responders.

## Figure 4: Global perceptions of free elections: fresh vs. frequent responders

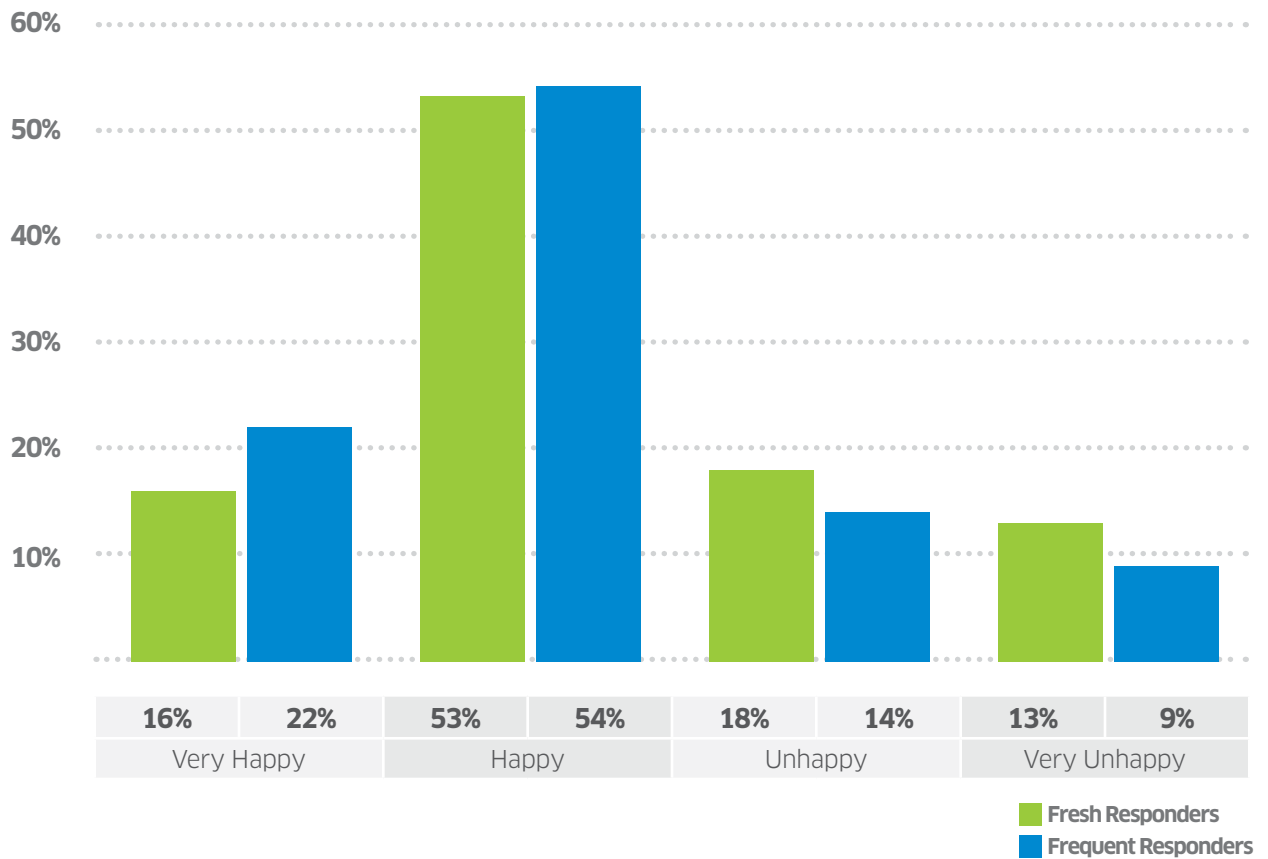
Freedom: Thinking about elections in this country, how free and fair are they? (N = 46,439)



We noticed a large difference in fresh and frequent responders on the question of fairness in elections. Frequent responders were much more likely to deem their elections free and fair. Fresh responders were much more likely to be critical of their nations electoral process. Does this difference reflect a polling bias one might see in any nation? Can it be addressed in the weighting of polls?

## Figure 5: Global perceptions of happiness: fresh vs. frequent responders

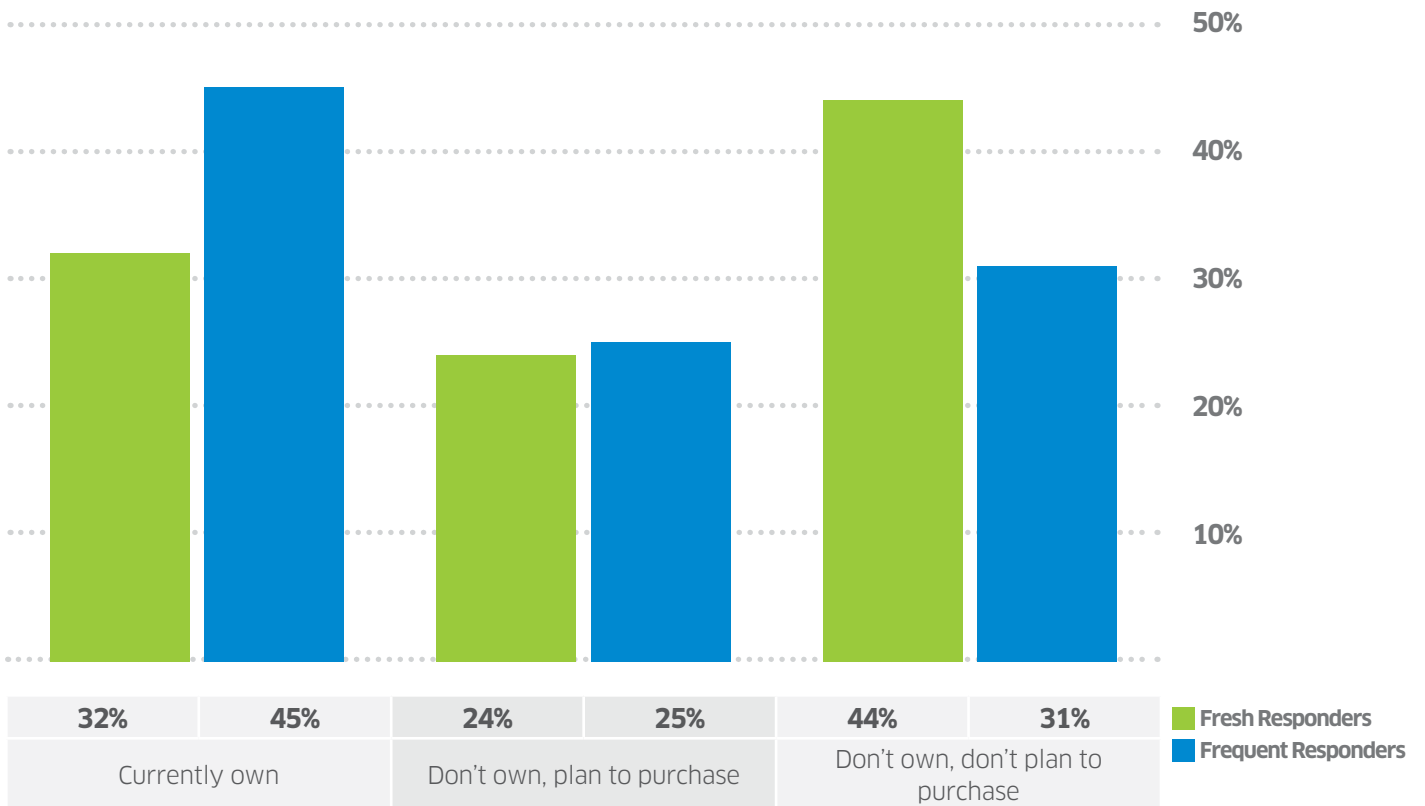
Happiness/Positivity: Taking all things together, how happy would you say you are? (N = 51,940)



We have a noticeable difference in overall happiness and unhappiness across the globe between fresh and frequent responders. Does this difference in self-reported ebullience yield an acquiescence bias effect in the case of survey questions where the respondent's support of ideas and concepts are measured?

## Figure 6: Global tablet purchase intent: fresh vs. frequent responders

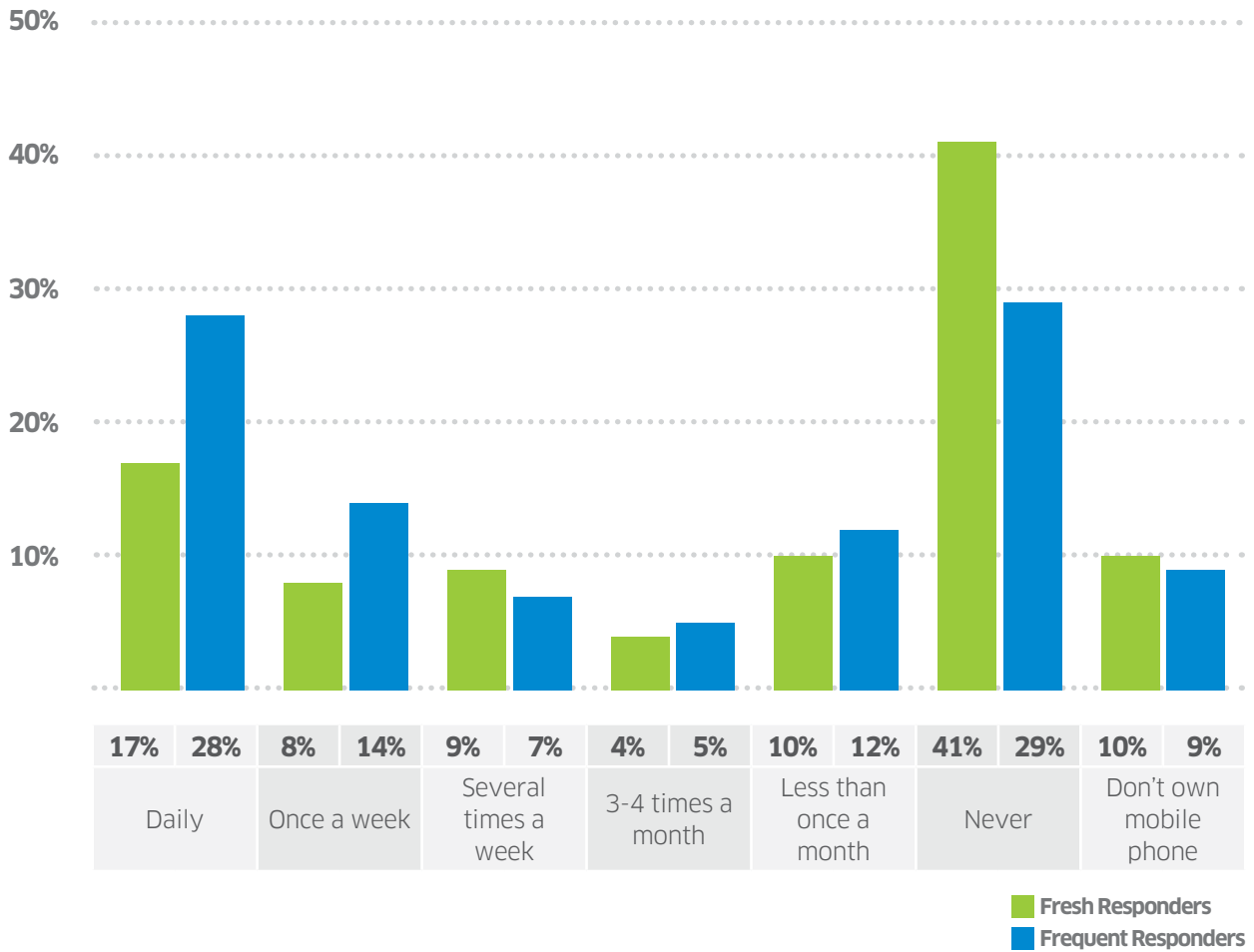
Technology: Do you own a tablet or plan to purchase one in the next six months? (N = 48,684)



We see an extreme example of the differences between fresh and frequent responders when asked a question regarding tablet technology ownership. Frequent responders are much more inclined to own tablets, which is consistent with many studies RIWI has run in the past with regard to new technology adoption. This insight is potentially beneficial when using panels and communities to reach early-adopters and trendsetters, but what risks are introduced when trying to project, from the answers of frequent responders alone, a proxy on the sample frame of the Web population as a whole?

## Figure 7: Mobile phone gaming: fresh vs. frequent responders

Technology: How often do you play games on your mobile phone? (N = 49,447)



Frequent and fresh responders are not just different in what they own, but as this question on mobile phone gaming suggests, they are also different in the degree to which they use technology. What can gaming research learn from these findings when there is such a large difference in both ownership and usage?

# Country Level Analysis

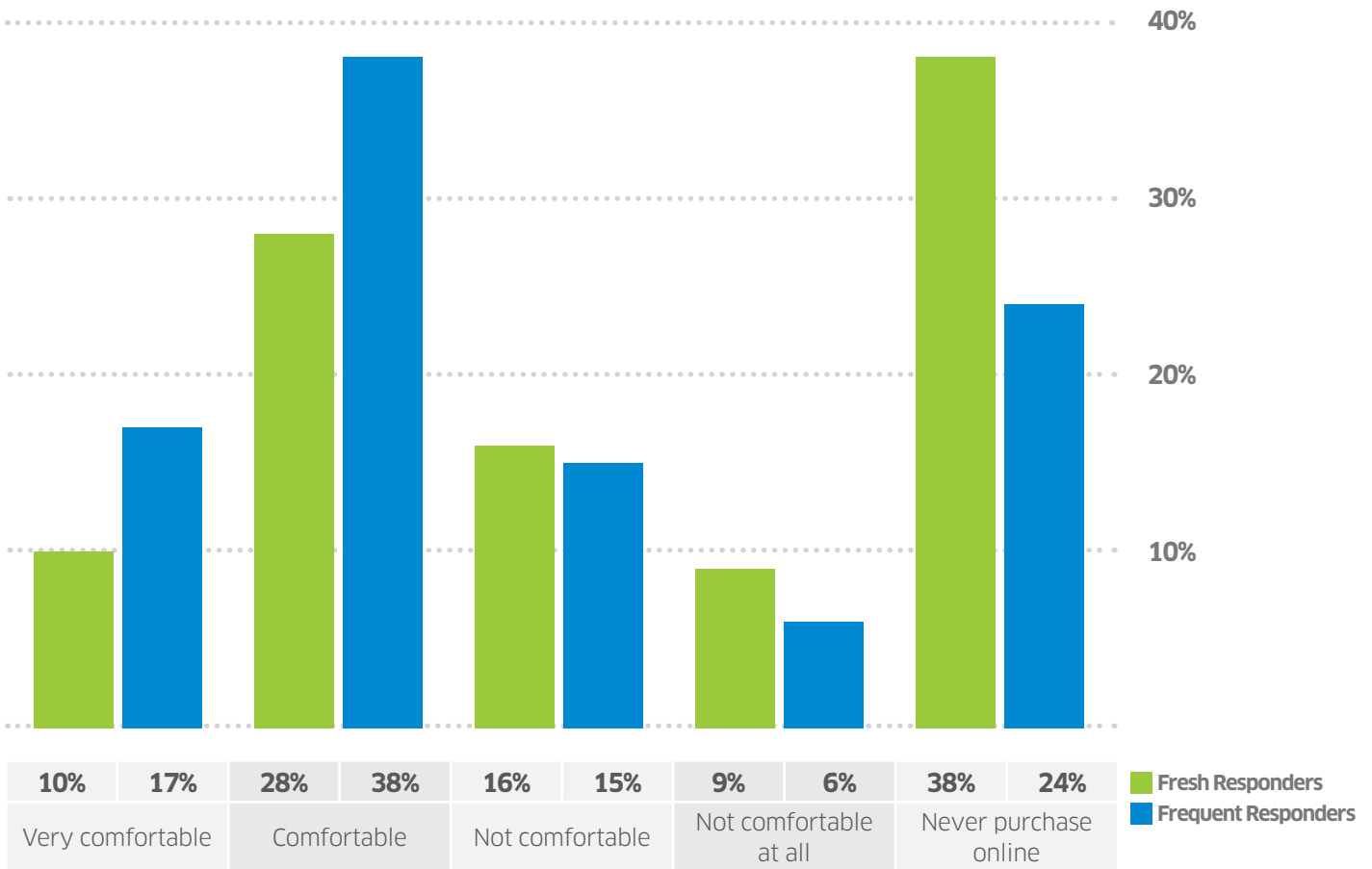
When significance testing is applied to the global numbers at a base size of N=55,000 even a difference of a couple of percentage points can yield a statistically significant difference and most researchers very rarely use combined country data. Therefore, to better illustrate the challenge of relying on 'frequent responder data' we isolated countries with robust base sizes and applied the same analysis. We used the following question that illustrates the profound difference in frequent and infrequent responders and also provides insight as to why the difference might exist.

## How comfortable are you in making online purchases?

On a total combined score the chart that follows reveals stark differences in comfort levels and usage levels of making online purchases among frequent and infrequent responders. In almost every country that we examined, frequent responders were much more comfortable with purchasing online; this begs the question, what impact does this difference have on data seeking to measure, for example, online purchase intent or consumer receptivity to an online campaign?

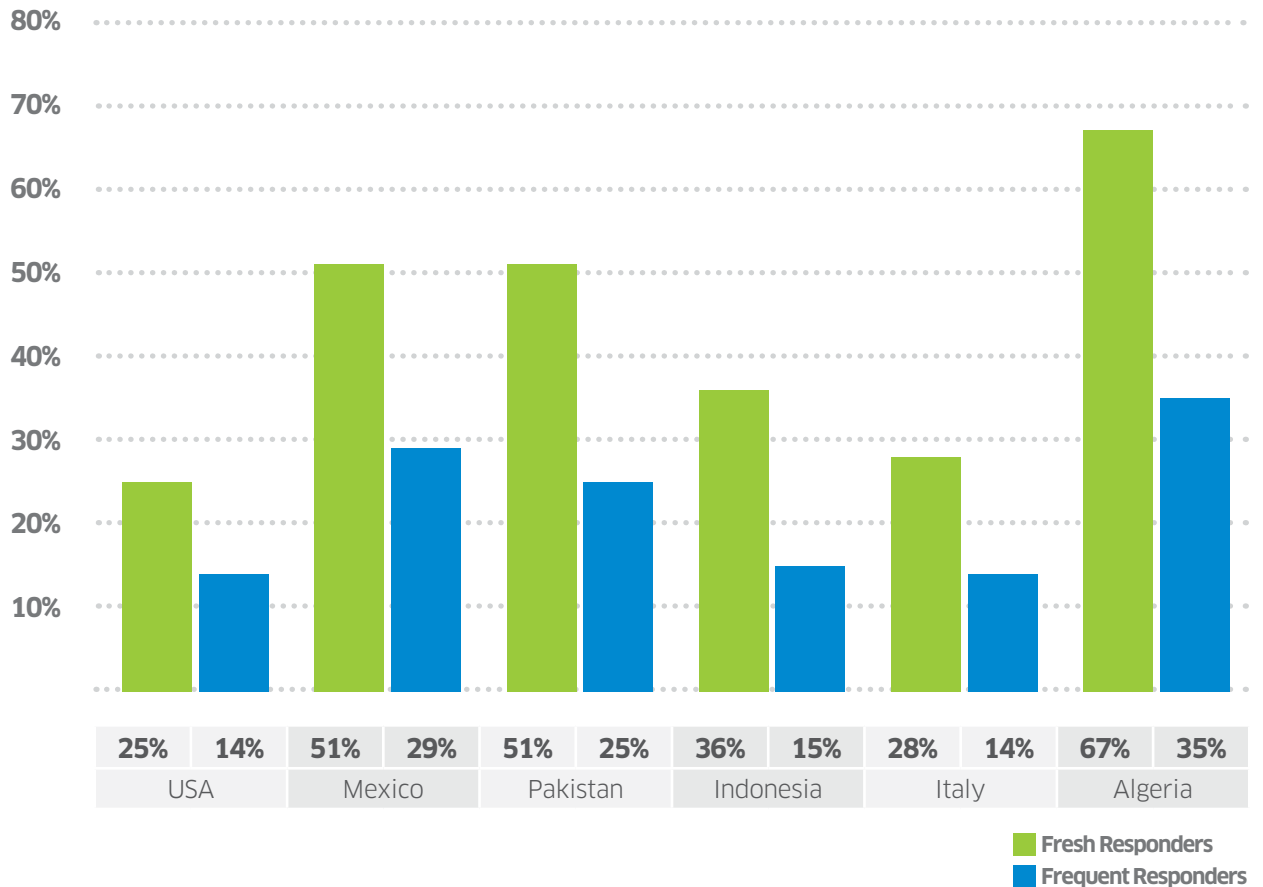
**Figure 8: Online purchase comfort: fresh vs. frequent responders**

Technology: How comfortable are you in making online purchases? (N = 48,859)



## Figure 9: Country Level - Never Purchased online: fresh vs. frequent responders

Technology: How comfortable are you in making online purchases? (N = 48,859)

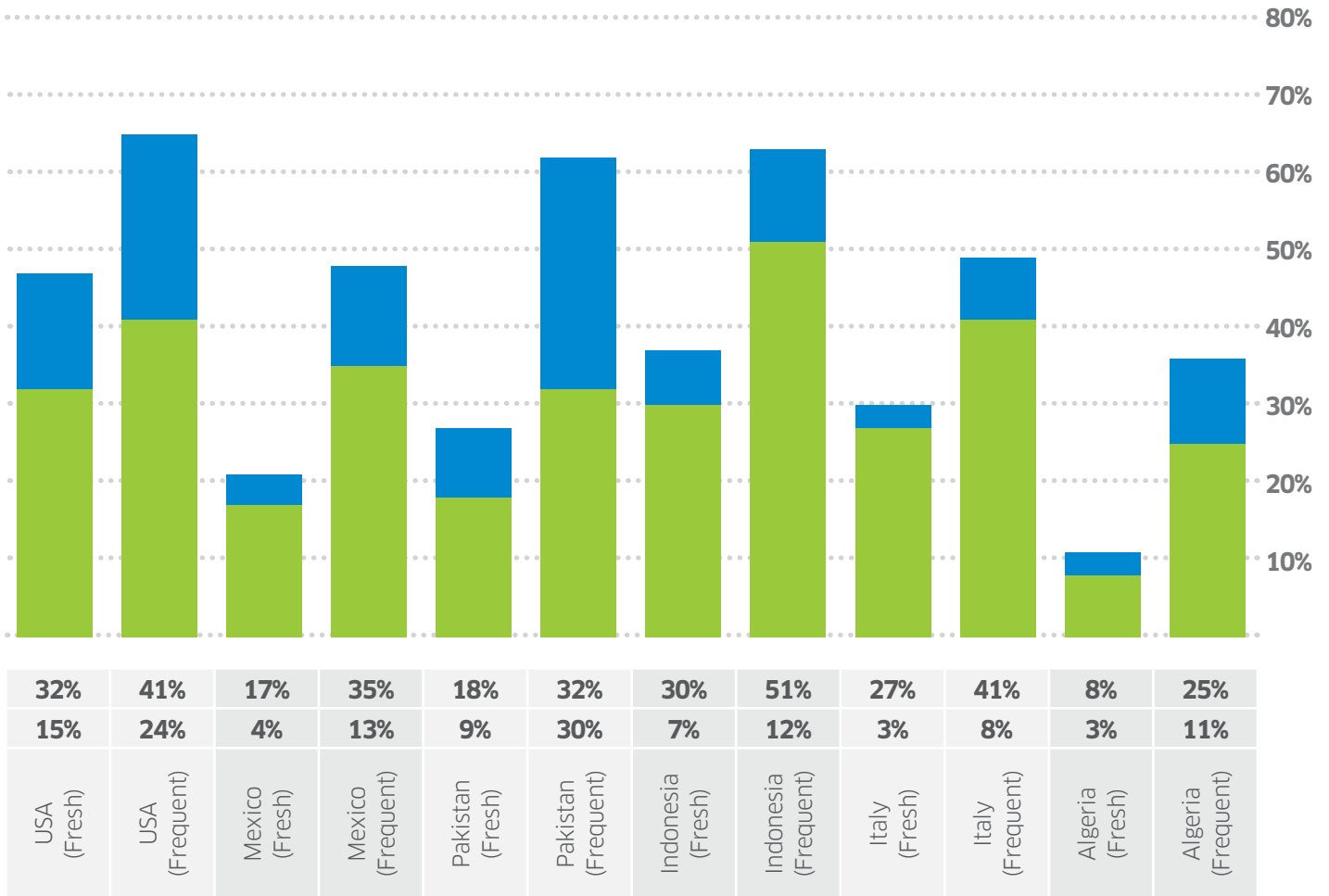


On a national level, we also see some major differences in online usage that could potentially give pause to any digital campaign manager or brand manager. What impact would there be on measuring purchase intent on a product sold on the Web in Indonesia when 15% of frequent responders would express concerns about purchasing online versus 36% of infrequent responders? Would that difference impact the ultimate decision being made? Should a blend of such categories be introduced in order to provide a more diverse Web-based sample frame?



## Figure 10: Country Level - Online purchase comfort: fresh vs. frequent responders

How comfortable are you in making online purchases? Sorted by Country, Fresh and Frequent Responders



■ Very Comfortable  
■ Comfortable

A steady pattern emerges that gives us insight into frequent survey takers. Their comfort at making online purchases and frequency of participating in online research suggests a markedly high level of overall comfort in sharing information and conducting purchases online. This psychographic difference could extend far beyond purchase intent issues, and poses a challenge to the market research analyst. How and when do we have to account for this bias? Can we extrapolate

response data collected from this type of Web user to represent the opinions of the general Web population? How do we use data collected on online panels where we see the most extreme examples of frequent survey participation?

What we are starting to see is there may be a 'type of person' who is a frequent responder. That character type is measurably different from others in terms of thinking and survey response behaviour.

# ADDENDUM

## About The RIWI Corporation

RIWI offers a patented, exclusive random domain intercept technology (RDIT™): a gateway to a non-incented global stream of respondents & data. Peer-reviewed and award-winning (IleX Philadelphia 2013): a disruptive & unique technology for ongoing global data capture. RIWI works with amazing global partners to identify new product opportunities, monitor and

improve customer experiences in 190+ countries, identify competitors' strategies, track brand preferences, monitor product performance – and tap into the changing preferences of a global, non-incented stream of respondents and data. RIWI invented global random domain intercept technology (RDIT™) and 21 related privacy-compliant claims.

## Study-specific considerations for GRIT CPR 2014

Specific to this study, RIWI undertook its traditional approach, with additional considerations. We were sensitive to many findings and expert industry feedback from GRIT CPR 2013. First, the Web-enabled population in the countries surveyed varies enormously. We were, for example, sensitive to an over-representation of male respondents, males being much heavier users of the Web, by volume of usage, in emerging economies. We wanted to ensure that, unlike last year, respondents were served up the questions in the dominant language of their country. Second, prior research (notably, GRIT CPR 2013) had shown that 73 percent of Random Domain Intercept Technology (RDIT) respondents globally had never taken a survey of any kind in the past month or longer. We wanted to validate this in this study.

Respondents were geographically representative of the random 55-country Web-enabled population.

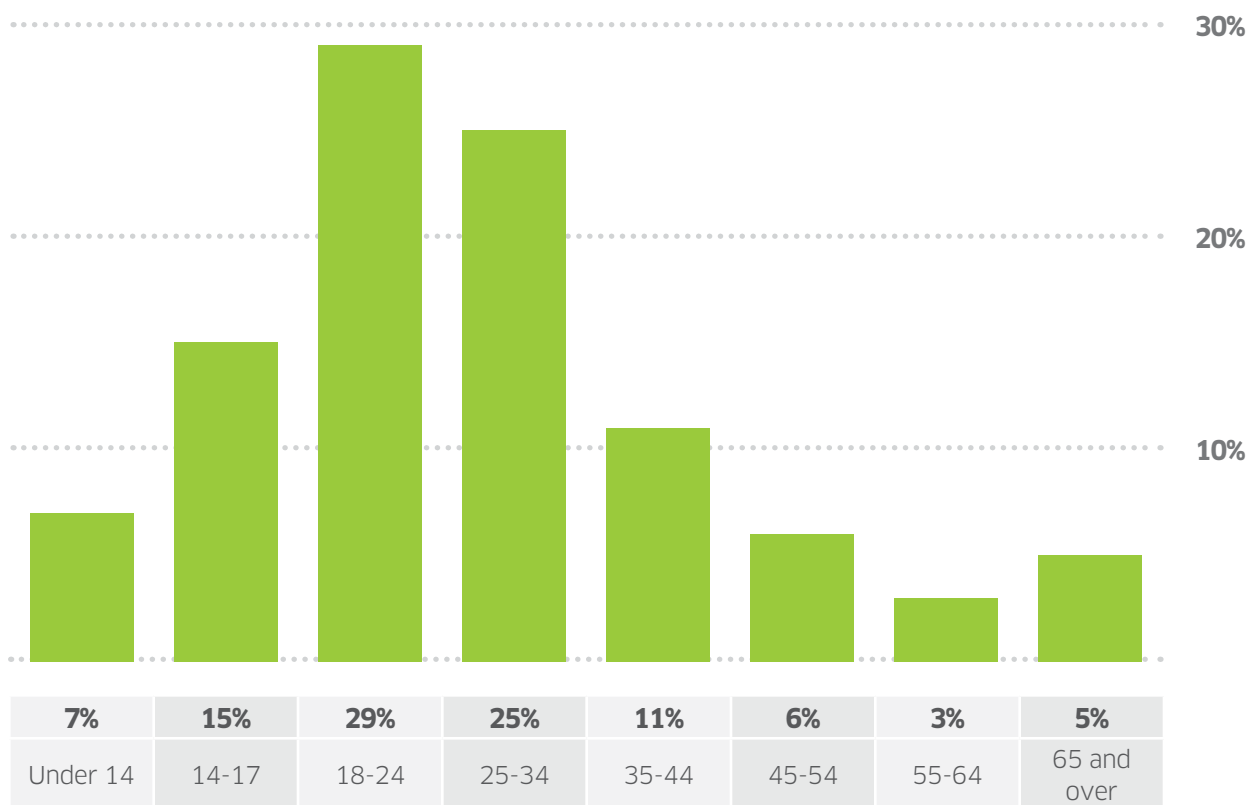
Data are thus skewed to younger Web users, so official re-weighting to age/gender splits was undertaken. To enable statistically viable comparisons among countries, and to acknowledge the younger age skew of many developing countries, the respondent base includes all respondents 14+. After the first questions on age and gender, the subsequent series of questions was randomized, so each question can have a different number of respondents.

Topic salience bias and self-selection bias are mitigated by high response rates and high sample sizes. No personally identifiable information was collected. IP addresses were collected, which were then auto-encrypted with an identifier. Two mother tongue-translators were used independently to ensure translation accuracy.

Algeria, Angola, Argentina, Australia, Austria, Brazil, Canada, Chile, China, Colombia, Dominican Republic, Ecuador, Egypt, France, Germany, Ghana, Guatemala, India, Indonesia, Iraq, Ireland, Israel, Italy, Jamaica, Japan, Kenya, Malaysia, Mexico, Morocco, Mozambique, New Zealand, Nigeria, Pakistan, Peru, Philippines, Poland, Portugal, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sudan, Switzerland, Syria, Trinidad and Tobago, Tunisia, United Arab Emirates, Uganda, Ukraine, United Kingdom, United States, Venezuela, Yemen, Zimbabwe

## Figure 11: CPR Age distribution across 55 countries

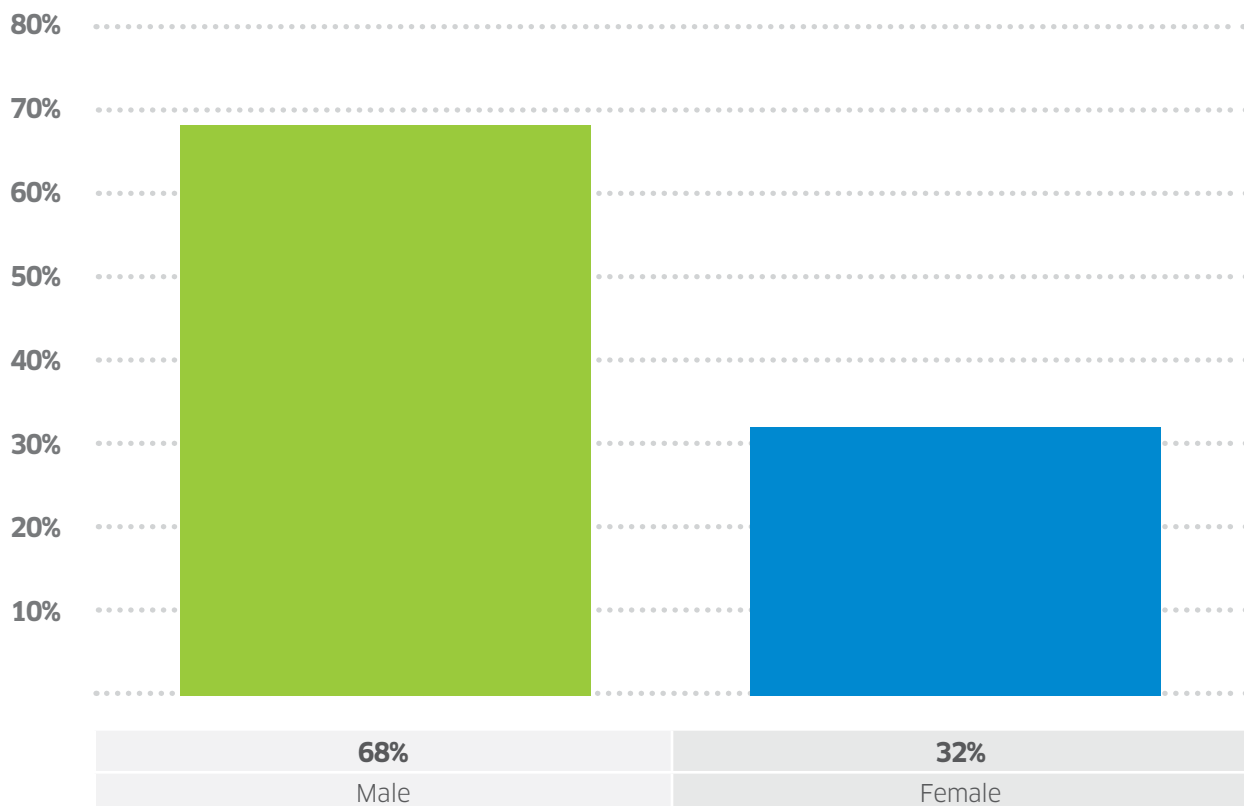
What is your age? (N = 347,475)



The RDIT approach is a mirror of Web usage by frequency and volume of use in any geographical location. As such, respondents who opt in to answer the opening question (despite there being no incentive to answer the question) skews young, the majority of respondents being under the age of 35. With respect to the statistical analysis, re-weighting to country-specific age/gender Census splits was undertaken. Those under 14 were screened out after the age verification question.

## Figure 12: CPR Gender distribution across 55 countries

What is your gender? (N = 347,475)



This gender imbalance is similar to GRIT CPR 2013 and of any global study that randomly intercepts Web users. The male/female ratio is much closer in developed countries (North America/Western European countries), for example, the US distribution was 52% male 48% female, respectively. In countries such as Pakistan there will be an extremely high ratio of males 77% due to cultural effects on Web usage among genders (such as the prevalence of women in the workplace, where Web access in poorer regions is often higher than it is at home).

” The data compiled by RIWI is truly game changing for consumers of public opinion data. To finally have actionable data from a population that hasn’t answered survey questions in the past allows for a more complete picture of public sentiment. RIWI’s ability to survey these respondents, previously thought to be unreachable, can provide a boon to marketing professionals as well as anyone else who is interested in understanding public opinion.

– Donny Furst, President, First International



GREENBOOK.

