Tailoring Communication in Business Surveys

Paulo Saraiva
paulo.saraiva@ine.pt

Sofia Rodrigues
sofia.rodrigues@ine.pt

Glória Carrilho
gloria.carrilho@ine.pt
Integrated Survey Management System

- Integrated Survey Management System (called SIGINQ).
- First covered the business surveys, and followed by the agriculture and household surveys.
Multi Survey and Multi Views

**Multi Survey integration:**
- Survey code
- Iteration ID
- Unit ID
- Variable ID
- Variable Value
- Value Version ID
- Data Collection Mode

**Multi View integration:**
- Surveys variables
- Registers
- Metadata
- Paradata
Simplified Business Information (IES)

In 2006: a mandatory national initiative for all companies to allow financial reporting to various public organizations

- Public agencies
- Legal Obligations for all Businesses

- Accounting, tax and statistical domains;
- Annual obligation through the corporate tax system via SAF-T
Statistics Portugal’s Automated Data Transmission

- Businesses may also use Automated Data Transmission (TAD).
- Upload of **XML files**, or a dedicated Web service.
- XML envelope, with variables from **one or more companies and surveys**, avoiding e-questionnaires.
- Currently available for 14 business surveys.
WebInq as a data provider communication channel

webinq.ine.pt

Multiple Associations
WebInq: Main User and Secondary User

SECONDARY ADHERENT MANAGEMENT

In WebInq, the lead member is automatically able to answer any inquiry from the units to which he is associated. It may, however, delegate this responsibility to other members known as secondary members.

In this option, you can manage secondary members for inquiries associated with your unit.

<table>
<thead>
<tr>
<th>Survey</th>
<th>Add</th>
<th>SECONdARY USER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>state</td>
</tr>
<tr>
<td>SURVEY 1</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>SURVEY 2</td>
<td>By enabling</td>
<td>-</td>
</tr>
<tr>
<td>SURVEY 3</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
Multiple ways to create, view and modify

Questionnaire Level

Variable Level

PDF

CREATE, VIEW, MODIFY

VIEW

CREATE, MODIFY

webinq
WebInq figures

- 83 business surveys;
- 70,000 companies in surveys (2018);
- 870,000 collected questionnaires (2018);
- 160,000 subscribing respondents associated with companies (20% more than one);
- 185,000 active companies (40% total);
  - 1,500 with more than 10 respondents
WebInq: Evaluation voluntary questionnaire – 2018

Response rate 63%

56,000 Participants
35,000 Voluntary opinions

Is WebInq easy to use?

- Muito fácil: 10.4%
- Fácil: 38.6%
- Nem fácil, nem difícil: 35.5%
- Difícil: 11.1%
- Muito difícil: 2.9%
- Sem opinião: 1.6%
Integration as a powerful communication tool

- SIGINQ allows to create tailored communication actions designed specifically for a segment of actors with similar characteristics:
  - same roles and behavior of the respondent in the response process;
  - business unit impact in the context of a survey and questions, suggestions, complaints and perceptions and the value of the data provided.
Communication strategy in business surveys

- There are aspects that differentiate companies and it should be taken into account whenever there is an opportunity or need for contact.
- The result is a **tailored strategy**:
  - communication actions adapted to the known context of the companies and the respondents.
- The electronic channel is clearly privileged, but tailored actions are also applied to the telephone contact.
Community Innovation Survey (started on July 2019)
- Sample: 15,219 companies (85% already WebInq)
- Target response rate 90%

<table>
<thead>
<tr>
<th>Item</th>
<th>Start</th>
<th>Reminder</th>
<th>Reminder</th>
<th>Reminder</th>
<th>Due Date</th>
<th>Follow-up</th>
<th>Follow-up</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>d</td>
<td>d + 30</td>
<td>d + 40</td>
<td>d + 50</td>
<td>d + 60</td>
<td>d + 70</td>
<td>d + 80</td>
<td>d + 120</td>
</tr>
<tr>
<td>Response rate</td>
<td>-</td>
<td>35%</td>
<td>55%</td>
<td>65%</td>
<td>75%</td>
<td>77%</td>
<td>81%</td>
<td>90%</td>
</tr>
<tr>
<td>e-mail</td>
<td>85%</td>
<td>86%</td>
<td>83%</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal</td>
<td>15%</td>
<td>14%</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>62%</td>
<td>41%</td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Communication strategy in practice – CIS 2018

Community Innovation Survey 2018
Daily Response Rate evolution

DUE DATE

D67
75%

D30
35%

0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%

D01 D11 D21 D31 D41 D51 D61 D71 D81 D91 D101 D111 D121
Improving results: Anticipate data analysis
Communication strategy in business surveys

- **Result → 93.4% reduction in communications costs in business data collection, between 2009 and 2018.**
Pre-notification strategies

- Use of pre-notification in some surveys that require a specific profile of respondent (email or telephone);
- To inform that the company will be involved.
- It allows the identification of the most appropriate respondent for certain types of surveys.
Another communication issue: are we relevant?

- Businesses consider statistical information brings **significant benefits to the society**, but they are more reluctant to admit their own interest on it.

  - **Action →** Improve feedback to data providers
Custom Feedback for business respondents

- Reports produced as a mixture of **individual** information and **aggregated data**, being an important way of communicating to have better and more collaborative data providers.
This feature is only available to specific WebInq users with appropriate authorization from companies to access this type of confidential information.
Tailoring Communication in Business Surveys

Paulo Saraiva
paulo.saraiva@ine.pt

Sofia Rodrigues
sofia.rodrigues@ine.pt

Glória Carrilho
gloria.carrilho@ine.pt