The Future of the Academic Survey Research Organization

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There was good news and bad news last February when the leaders of North America’s top academic survey organizations gathered in Bloomington for the 2010 Directors Meeting of the Association of Academic Survey Research Organizations (AASRO). We heard with trepidation about the imminent closing of a venerable survey unit at one state university, while several others reported vigorous recent growth and new investments from their universities. Some reported that the volume of work was down in their telephone labs, while others said they were scrambling to keep up with demand. Nearly all were experiencing some effects of the 2009 economic downturn, which affected both the budgets of our universities and those of the state agencies and local governments upon which many of us rely for contracts. On the other hand, federal stimulus money recently had been poured into medical research, and some of our centers were benefiting from that flow of support. We will not know with any certainty where the academic sector of the survey industry stands (in terms of aggregate business volume) until the 2010 survey of AASRO member organizations is completed. In the meantime, the questions remain: Is our sector in trouble? Is telephone survey work in serious decline? How do we adapt to the challenges we face?

The Academic Sector in Context

The survey industry can be thought of as comprising five distinct sectors:

- government
- academic
- market research
- media and public polls
- political polling

The academic sector is uniquely American, for there is no other country in which academic survey centers are nearly as numerous as in the United States. There is no certain figure, but the best estimate from AASRO’s database of members and nonmembers is that there are as many as one hundred active, university-based survey centers in the U.S. and Canada. The proliferation of centers in North America can be explained in part by the fact that survey methods were initially promulgated in U.S. academic centers such as those at Columbia, Michigan, and Chicago and that empirical, quantitative approaches to social science came to intellectual predominance in American academic journals and departments after 1960. The emergence of new centers was facilitated also by the structure and culture of American universities: highly competitive, free of direct government supervision even when state-funded, and generally supportive of faculty initiatives. While the academic sector is large in the aggregate, most academic survey centers are small organizations, and we are dwarfed in comparison to the larger commercial firms (see Honomitchl, 2009). In the past decade there has been a pattern of rapid consolidation and internationalization of commercial firms in the market research sector, but mergers are virtually unheard of in the academic sector. Academic centers occupy
a unique role in the survey industry, for we are not
only leaders in innovation and methods research
also but combine education and training as vital
components of our mission along with service and
research. These multiple roles create distinctive is-
ues for us as organizations—more on that later.

As was previously documented in this periodical
by Diane O’Rourke, the late Seymour Sudman, and
Marya Ryan (1996), the number of academic survey
organizations increased rapidly in the 1980s. It was
in that decade that microcomputers (what we now
call "desk-tops") and the networks to interconnect
them within a room or building (LANs) were de-
veloped. Affordable commercially or locally developed
software to run computer-assisted telephone in-
terviewing (CATI) on networked microcomputers
soon followed; the CASES cooperative program for
developing such software, headquartered at Berke-
ley, played an active role in spreading the technol-
gy. It was now possible to start up a calling center
for an initial investment in hardware and software of
just twenty to forty thousand dollars, and dozens of
entrepreneurially minded teams of social scientists
around the country entered the field, doubling the
number of academic and nonprofit centers in the
course of the 1980s decade (see chart in O’Rourke
et al., 1996). In the 1980s and ’90s, RDD telephone
surveys and Dillman-style mail-outs were the main-
stays of these centers; in the 1990s, the centers
added capabilities to design and host Web-based
surveys as well. In the decade just concluded, the
growth of the academic sector leveled off, and we
can now be thought of as a maturing sector. Were
it the case that the numerous academic centers all
were competing directly with one another, we would
probably be in the throes of a “shake-out” phase,
in which less-competitive organizations would be
forced out of business, but the fact is that we are
rarely in direct competition with one another and
instead tend to thrive in fairly localized markets or
specialty research niches. Perhaps historians will
see the creation of AASRO in 2008 as a collective
response to the needs of our sector as it passed
from its days of heady growth into maturity.

Common Dilemmas

Academic centers have, from the beginning,
faced some common dilemmas:

Multiple missions. Academic survey centers, like
the universities of which each is a part, are expect-
ed to further some mix of three different missions:
research, education, and service. In practice, it is
difficult to harmonize these. Some survey centers
are set up as service centers primarily, charging
fees for service. Others are set up in the more tradi-
tional framework of a research center, in which sala-
ries or wages are charged directly to various grants
and contracts. Some are housed within schools
of arts and sciences, closely allied with the social
sciences, while others are more separate from the
university’s teaching units. Some are led by tenured
professors, others by nontenured professional staff
or adjunct faculty. Some are homes to formal train-
ing programs in survey research, and all offer ap-
prenticeship opportunities for graduate trainees. It is
typical that these organizations hold an ambiguous
status within the university, for they are neither fish
nor fowl, sometimes acting as service units subor-
dinate to researchers elsewhere in the university,
sometimes leading their own research projects, of-
ten expected to educate students but almost never
supported financially for doing so.

Tension with departments. Survey centers are
similar to other academic research centers in their
often rocky but ultimately symbiotic relationship
with academic teaching departments, a relationship
that Hal Winsborough (1992) has eloquently de-
scribed as one of “essential tension.” It is clear that leading
an academic survey center is not a good strategy
for a faculty member seeking to gain tenure. Depart-
ments value basic research, while survey centers
mostly do applied work. Survey centers mostly
work on contract, while academic research faculty
are more often funded by grants. There is endemic
competition for access to the “indirect cost” funds
that accompany research grants, as well as for
the services and loyalty of the most able students.
Many social science faculty feel themselves to be
perfectly capable of conducting a survey with their
own resources, while the survey center staff feel
that their accumulated experience and expertise are
invaluable to nearly any proposed survey project. To
be successful, survey centers must continually se-
cure control of sufficient resources to sustain them-
seves, while sharing credit and funding streams
sufficiently with academic departments to maintain
the political support of their key faculty.

Small size and fragility. Many academic survey
centers have but one or two full-time positions, rely-
ing on a host of part-timers to staff interviewer and
research assistant positions. Many are still led by their founding directors, a number of whom have now been leading (and constantly re-inventing) their organizations for more than twenty years. As already noted, many survey centers are led by non-tenured faculty or staff. While small organizations enjoy advantages of nimbleness and flexibility, they are vulnerable to succession crises and may lack the reserves needed to weather business droughts. They are dependent, as well, on maintaining the good graces of those above them in the university administration, academic managers who may not be social scientists and may not support their mission mix. The future of some academic survey research organizations is only as bright as the smile on the face of the next dean.

New Threats, New Opportunities

In a useful strategic planning exercise that the assembled directors carried out in February at Bloomington, we identified several current threats that academic centers are facing, some of them coming from outside the university and some from within. All survey modes face increased challenges today because potential respondents are savvier, more selective, and more likely to feel that they are over-surveyed (see Dillman, 2009 for discussion). A major issue is the decreasing efficiency and coverage ability of traditional landline RDD telephone surveying. As RDD becomes more expensive, demand for the services of a CATI lab becomes more selective. The ubiquity of do-it-yourself Web-based surveys, made easy by on-line packages like Survey Monkey, Zoomerang, and a host of others, threatens to replace the services of the survey center, even though the quality of the DIY research rarely will equal that which is guided by the center’s experts. Some important state and federal contracts that for years have been a mainstay for academic centers are moving into the hands of commercial firms that have been able to offer cost-savings by virtue of specialization and economies of scale.

There are threats, as well, from within the university. When the university faces funding cuts, as most do today, any unit that is losing money, even temporarily, is a target for elimination. Whether in the red or in the black, survey centers that rely upon securing a share of indirect costs (also known as F&A charges) are facing more intense competition from departments for these funds. It always has been the case that some investigators may prefer to run data collection activity through their own department so that the accompanying share of indirects also will flow to their department. In the current climate of scarcity, this tendency is increased.

On the other hand, new trends and new technologies offer opportunities for academic survey centers to develop expertise and technical capabilities that will expand their lines of services and ensure their continued indispensability to their clients. In the phone lab, the new frontier is the random dialing of cell phone exchanges, which are added to conventional landline RDD samples to field surveys with a dual-frame telephone sample design. Academic labs have been important players in the recent explosion of research on dual-frame samples (Lavrakas et al., 2007). Not all, however, have yet recognized the full implications of the “cell phone revolution” in telephone sampling. We tend to think of dual-frame designs as a means of repairing coverage gaps that have arisen in the landline RDD sampling frames that we traditionally have used. That is, we justify the higher cost of the cell phone calling (Guterbock et al., 2010) as a means of reaching the “cell-only” adults that we otherwise would miss. But calling people on their cell phones in fact increases the reachability of many people who, while theoretically covered in the landline household frame, were in fact rarely reached by calling household phones. Males, renters, young people, minorities, single adults—members of all the groups who are conventionally underrepresented in phone surveys—are now within our reach because they carry a wireless phone with them throughout the day and evening. When compared to alternatives such as Internet surveys or ABS sample designs, dual-frame telephone surveys are the one current method that is able to survey a broad cross-section of the general public in a short time with excellent representativeness.

More generally, the move to multimode survey designs (Dillman, 2009) and the development of ABS sample designs that deploy multiple contact modes also present new opportunities. These are part of a larger trend toward “tailored design” and what might be called “micro-tailoring,” in which different respondents within the same study are approached and/or surveyed with different methods and protocols as may be suited to their preferences (or the researcher’s prediction of their preferences).
The new, mixed methods are demonstrably more effective, but they carry additional expense and considerable new complexities for the survey organization.

**Reshaping the Academic Survey Organization**

These new opportunities bring with them organizational challenges for survey organizations that were built to meet the needs of older technologies. The socio-technical systems that we have gradually built up over the years to meet the needs of single-mode surveys do not work well for multimode studies. A decade ago, one could manage and staff a CATI lab and a mail room as fairly separate entities. Interviewers needed good phone skills and the ability to follow along with a CATI script, which most could do fairly well with just a few hours of training. A small group of professionals would design a study and program the CATI system, then turn the phone study over to the lab for a few weeks of production work on the phones. Mail-outs could be managed and tracked on their own software platforms, separately from the CATI system, using idle interviewers or detail-oriented clericals without the phone skills. Web surveys ran on different systems altogether and could be left in the hands of the programmers with some help from the mail-out folks.

The new multimode technologies demand a different organizational framework and different types of personnel. Software systems must be linked or integrated so that, for example, a completion by telephone is registered instantly in the database to prevent the respondent from receiving the next e-mail reminder and to trigger the sending of a promised incentive. Interviewers must be capable of accessing e-mail or a respondent database so that they can, upon request from the respondent, send electronic information about the study or a hotlink to the Internet version of the questionnaire. They are likely to have more contacts with respondents, via more than one mode, so their respondent service skills must be solid and need to be cultivated and rewarded. Project managers and supervisors need to be comfortable with multiple systems, and phone, mail, and Internet staffers need to work together in real time to move a study through the field. If the old survey center had a pyramid-shaped staffing layout (a few supervisors and study coordinators riding herd over a large number of temporary interviewers), the new technologies mandate a shift to a more diamond-shaped distribution across levels of wage and skill; a larger number of data-collection technicians is needed, employees who combine interviewing skills with the ability to communicate by electronic means, make respondents happy, and manage cases across one or more complex databases. People with those skills need more training, higher pay, and a longer career outlook than has been traditional for telephone interviewers in some of our labs.

**Keys to Success**

Most academic survey centers are well along the way in transforming themselves to meet the demands of the new methods and technologies of our craft. Whether by design or by improvisatory accretion, they have developed a more flexible, cross-trained staff. They offer multiple products to their clients, allowing each study to choose as needed between various modes or combinations of modes for respondent contact and for actual data collection. They have realized that the proliferation of user-friendly Internet survey packages can bring in new business from do-it-yourselfers who have understood, sooner or later, that they need expert help to conduct a successful survey. They have developed multiple funding sources, not solely depending on grants to PIs in their own universities but contracting directly with outside units such as local or state governments, federal agencies, nonprofits, or researchers from other universities not blessed with survey centers of their own. They have added cell-phone calling capabilities to their CATI protocols and thereby increased the statistical efficiency of their phone samples. With mail-out and phone capabilities already in place, they can offer effective address-based sampling strategies to their clients. Further, they have adopted from the business world a focus on customer satisfaction and sound ways of budgeting, pricing, and tracking their costs and have found ways to maintain the motivation and commitment of their key staff and to manage internal conflicts and crises effectively. Above all, they keep survey quality always in mind, understanding that survey quality is not achieved just by minimizing survey error but also by optimizing the timeliness, value, clarity, and relevance of the survey information that is supplied to the client (cf. Groves, 2005). For academic survey centers that have reoriented their staffing and technical systems so as to manage the multimode matrix while pursu-
ing that broader goal of survey quality and value, the future is indeed bright.

References


CURRENT RESEARCH

Further information on the studies described in this section should be obtained from the organizations conducting the studies at the addresses given at the beginning of each organization's listing. Neither Survey Research nor the Survey Research Laboratory can provide this information. Study summaries are accepted by Survey Research with the understanding that additional information can be released to others.

ILLINOIS

National Opinion Research Center (NORC)
University of Chicago
1155 East 59th St., Chicago, IL 60637
773-256-6000; fax: 773-753-7886
norcinfo@norcmail.uchicago.edu; www.norc.uchicago.edu

Teaching Artists Research Project. The Teaching Artist Research Project is surveying artists and managers of the programs for which they work in diverse institutions and venues in a dozen study sites from Boston to San Diego. The surveys are focused on educational, demographic, and financial data, the terms and conditions of teaching artists' work, and the relationship of teaching to art making. Principal Investigator: Nick Rabkin, Project Director: Michael Reynolds.

Survey Research Laboratory (SRL)
University of Illinois at Chicago
412 S. Peoria St., 6th Floor, Chicago, IL 60607-7069
312-996-5300; fax: 312-996-3358, or
505 E. Green St., Suite 3, Champaign, IL 61820-5723
info@srl.uic.edu; www.srl.uic.edu

Atlantis Evaluation. The College of Urban Planning and Public Affairs at UIC received an award from the Fund for the Improvement for Postsecondary Education to develop and implement a transatlantic degree program with the Univ. of the West of England in Bristol and Politecnico di Milano in Milan. Via document review and interviews with student participants, SRL conducted an evaluation of the program in the latter half of 2009. Project Coordinator: Kara Pennoyer.

Survey of Managers and Subordinates. This Web survey of MBA graduates from the Liautaud Graduate School of Business at UIC and the Northern Illinois Univ. (NIU) MBA Program and their supervisors was