Online Respondent Management and Data Collection

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Introduction

Market research is comprised of a complex combination of activities and processes that must work together to produce reliable results from research respondents. A variety of data collection and full-service research firms have developed techniques, methods, and systems for recruiting, aggregating, managing, rewarding, sampling, and surveying respondents. Unprecedented levels of marketing and advertising research are completed today using the internet, databases and panel systems - and we can expect this type of data collection to continue. It is critical that the results be accurate, precise, and trustworthy if clients are going to be able to rely on this data to make important business decisions.

Recruiting – the importance of a varied approach

Recruiting online to build panels and databases is one of the most common and cost-effective methods to identify and recruit research respondents for qualitative and quantitative research. Online recruiting for panels has largely replaced traditional phone recruiting for all but the most exceptional panel-building circumstances. For some clients, phone and other grass roots efforts continue to be critically important for certain hard-to-reach audiences like business executives and certain therapeutic areas. Online panel recruiting campaigns are cost-effective and can effectively generate a critical mass of potential research respondents - and it’s even possible to draw them from only a few online sources to build a critical mass. While cost-effective, this strategy is highly risky in terms of capacity with a specific target, over-use of a respondent and bias of the sample.
Phone or face-to-face recruiting to capture portions of the population largely absent from the Internet population remains an important aspect of respondent recruiting. It is also the best method to proving respondent validity and ensuring high levels of respondent articulation. It remains a highly effective method for a wide variety of difficult to recruit targets. Recruiting for business executives, specialty targets, patients and caregivers is often best achieved using a mixed recruiting approach for a variety of reasons. Chronic disease increases with age and as age increases Internet penetration rates are lower. Business executive do not typically join panels. By using traditional and face-to-face methods, access to portions of the population that are not online is maximized. Building recruiting networks through relationship building (example - numerous advocacy group relationships have been established as a source of respondents) is also a highly effective way of sourcing a critical mass of B2B targets, patients and caregivers.

The ability to engage respondents effectively is increasingly difficult - or at the very least different – today versus 15 years ago or even 5 years ago. And, it will be different tomorrow. There are many new types of media that can be used to source respondents and the opportunity that potential research respondents have to engage with any form of communication continues to rise as digital communications become more ubiquitous and sophisticated. Combining new digital techniques such as special media and digital search tools is an important source for identifying and engaging with qualified respondents and needs to be incorporated into effective respondent recruiting.

Sample – the importance of virtual panel and project management

Because of the difficulty to engage targeted respondents, research and data collection companies regularly combine various research panels and databases. Combining panels and databases to identify a critical mass of qualified respondents is a reliable, efficient and cost effective way to manage research projects provided proper care is taken to ensure the validity and appropriate utilization of the respondent and consistency in the process.

In today’s world of online survey research, many people belong to more than one research panel. The industry uses the term “panel overlap” to describe this characteristic when combing panels and databases. The ARF Foundations of Quality (FoQ 1) study fielded in 2007 across 17 different panel companies found a 41% match in...
respondents at an aggregate level. In that study, 61% of the panelists reported belonging to more than one research panel. Still, given high levels of panel overlap, it showed that panels differ across key respondent characteristics that impact research results — concluding that different online panels can produce different results. They also found that just because someone belongs to multiple panels, it does not necessarily lead to quality issues in the research provided that consistency in operations are maintained and that the de-duplication process is accurate and consistent across all panel and database resources. Consistency in how combined panels are recruited, managed and de-duplicated is critical to ensuring good data quality.

Existing methods of de-duping within studies including digital fingerprinting, phone/address matching, and the use of browser cookies and/or eTags that must be applied consistently in order to be effective and reliable. A sophisticated method of de-duping is necessary to ensure individual panelists are not invited to take a survey more than once, especially when using multiple panel sources to ensure data quality.

Panel overlap has an impact on respondent utilization and controlling how many interviews or surveys are allowed per respondent is an important part of research and project management. Many panel companies have different respondent utilization rules (i.e. who can join, how many times they will allow a respondent to participate in research opportunities, etc.) Because of panel overlap - control of respondent utilization must be managed centrally across all sample providers, especially when using multiple market research project suppliers over time. This is especially important if the targets are B2B, healthcare professionals or low-incidence patient and caregiver populations where the populations are limited and several panel or database sources must be leveraged to meet the sample requirements. It is highly possible – and even probable – when working with low incidence targets where the respondents are limited, that certain respondents will be over-researched.

Because different panels can yield different results, high quality research processes call for not only validated recruiting but also require consistent sampling across the various sample sources. Sample blending, the term utilized to explain how different pools of respondents from different panels and databases are aggregated together, is another key driver of research quality. Best practices in sample blending, especially for small populations, call for reputable recruiting, active panel management, continuous profiling, and appropriate incentives to ensure consistency of the panel blend for the duration of the research need.

Due to the increasing challenges with respondent identification and engagement, the use of survey routers, a tool that increases the efficiency of sample availability across one or more panels, has grown substantially in the past three years. This sophistication extends to new and promising sampling methods using a tool that enables companies
to dynamically select survey respondents from multiple sources based on how well their characteristics match specific screening criteria. There is limited client understanding and information about different types of routers, how routers work and their potential impact on data quality. In fact, routing is a singular catch-all term and it is implemented in different ways across industry providers.

Because of the differences in processes and algorithms, there is an infrequently discussed but known impact to survey data leading to significantly different data outcomes across sample providers. Many things differ among providers, including selection methods and algorithms, sample and study management, and especially knowledge and skillsets of router personnel. A variety of variables may impact the resulting study data, based on various settings, methods, and management practices used in a router. To ensure data quality, correct and consistent router practices are required.

The Importance of Mobile

The prevalence of using mobile devices to complete online qualitative and quantitative research raises another challenge that needs to be considered in any forward-looking research plan. Between 2011 and 2013, the Pew Research Center’s Internet & American Life Project found that the proportion of U.S. adults owning a smartphone rose from 40% to 56% of adults—a 40% increase. At the same time, panel companies are reporting respondents are accessing survey invitations via mobile sometimes as high as 60% in the US. Outside of the US, where mobile phones are more prevalent than laptops and desktops, this trend will be more pronounced.

The double digit growth of both smartphones and tablets demands prompt and serious attention to how we can accommodate the desires and habits of a growing portion of the online survey respondent population. There are a limited number of survey technology companies that can effectively manage online research via mobile well and that have adopted a “mobile first” policy of ensuring that all new technology and tool releases support online data collection effectively or the ability to block mobile access if the research cannot be fielded accurately via mobile. While some see blocking survey access for mobile respondents as a simple solution, it exacerbates the sample availability challenge and can bias the respondent pool for certain demographic groups, such as younger populations.
Recruiting Platforms and Protocols

Researchers can maximize research quality by identifying and implementing a best-in-class centralized and customized recruiting and data platform that effectively recruits for their targets. It should be organized around the researcher requirements in terms of respondent recruiting, sampling protocols, data collection and cleaning processes – the focus should be on high quality and consistency of operations. In addition, the platform should utilize industry-leading technology that will be continually upgraded to reflect the latest proven technological advances for mobile, data privacy, efficiency and accuracy.

Sampling protocols, profiling and blending should be managed in accordance with the research company’s specific best practices. Due to the limited availability of qualified sample for certain target populations, identifying and utilizing respondents across fully vetted research suppliers will include protocols that drive standardization from sampling to data cleaning. Adherence to the research company’s best practices in respondent utilization should be implemented. Survey and interview participation rules will be developed and implemented for different categories of target respondents.

Consistency and transparency in how a project is sampled, managed and weighted should be required for all projects to drive research reliability and replicability. All panel and database suppliers should be required to follow the research company’s SOP’s including the consistent use of a research company question library. Consistency in questions and rating scales will drive comparability and the ability to add value to longitudinal data sets across various projects and research programs. Survey data formats and cleaning rules will be managed consistently to provide opportunities for easy and reliable cross-analysis.

An “in-advance” respondent recruiting program needs to be in place for hard-to-reach targets for planned research activities. It is no longer sufficient to wait until the contracting of a market research supplier to begin the recruiting process, recruitment can begin in advance and be “ready to go” for the project when it is launched. In addition, strategic groups such as customer segments can be programmed and permanently stored on the panels to ensure that pre-recruits are matching respondent demands. The ability to detach recruiting from a project and build a strategic process that is time efficient, respondent selective and longitudinal provides a whole dimension to any and all market research projects.
Summary

With the growth in the importance of research, combined with increasing challenges of identifying and engaging respondents, we can implement technology and consistent best practices to ensure the quality of the samples on which clients are basing business decisions. Working with our clients, we can establish higher quality approaches to conducting representative research, carefully and effectively managing the different types of sample sources used across sample providers for all types of surveying methodologies adopted within the industry. Based on the research company’s desire to better understand how to conduct research that is representative and repeatable, Schlesinger Associates can organize the initiative, bringing together data collection sources using improved best practices and improved technology to improve research results.