

Do we really need proper research any more?

The importance and impact of quality standards for online access panels

Matthew Burn
ICM Research Limited, UK

Jerry Thomas
MSTS Limited, UK

This paper describes the results of two studies conducted by Matthew Burn of ICM Research and Jerry Thomas of MSTS. The first piece of work: The Research Buyers Survey, describes work undertaken amongst a range of research buyers, to understand their views of different data collection methodologies.

The second study involves two experimental tests to examine what mode effects exist when the same respondents are asked the same questions via different methodologies. In short to establish whether people answer the same questions differently depending on whether they do them online, by telephone or on paper.

This paper also draws on other original research studies conducted by ICM and MSTS which look at issues of panel and response rate bias.

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Matthew Burn & Jerry Thomas

Abstract

Do we really need proper research anymore? In short, the answer is yes, of course we do. However, significant numbers of research buyers appear to be increasingly willing to use online access panels and to trade confidence in the accuracy of results in return for cost savings and faster turn around times.

Furthermore, our research indicates that many research buyers feel under pressure from their own internal clients to deliver results more cost effectively and more quickly, regardless of the issues surrounding the quality and validity of the research methodology selected.

This paper describes the results of two studies conducted by Matthew Burn of ICM Research and Jerry Thomas of MSTs. The first piece of work; The Research Buyers Survey, describes work undertaken amongst a range of research buyers, to understand their views of different data collection methodologies.

The second study involves two experimental tests to examine what mode effects exist when the same respondents are asked the same questions via different methodologies. In short to establish whether people answer the same questions differently depending on whether they do them online, by telephone or on paper.

This paper also draws on other original research studies conducted by ICM and MSTs which look at issues of panel and response rate bias.

The results suggest that research agencies and clients need to be careful not to allow the speed quality trade off to become too one sided, or in other words be careful not to go too fast. Speed of turnaround is without doubt a key part of the allure of online panels, but how fast is too fast? Our work suggests that researchers need to invest both time and resource in generating appropriate quota frameworks for studies conducted online, if they are to generate results that are representative of the market in question. Furthermore, our results show that researchers need to be careful that conducting online research at speed (e.g. doing all the interviews in one night or a matter of hours), does not naturally exclude some types of respondent from taking part.

The findings also show that mode effects can influence the way respondents answer exactly the same questions. It is imperative that researchers understand the issues of mode effect as research buyers are increasingly looking to online panels as their preferred data-collection methodology and to deliver some of their most high profile insights.

Introduction

Market research methods have moved on appreciably over the past 50 years and, especially, over the past 25 years when advances in technology have offered better (this usually means faster, cheaper and more accurate/efficient) ways to interact with respondents.

Although this paper will concentrate on looking at some of the issues surrounding the advent of online research, it is probably worth mentioning something similar that happened in the early 1980's (in Europe, at least).

In the late 1970's and early 1980's, the use of the telephone as a data collection method grew. This was used mainly to replace quota samples and, especially, meant it was much easier to conduct B2B research. However, when the issue of using it for representative samples was raised, a furore took place over two main issues:

1. **Penetration** - ownership of telephones was low
2. **Representivity** - were telephone owners different to non-owners?

In the UK, the industry debated these issues long and hard and the Market Research Society (MRS) sponsored parallel runs to understand the differences (even though household penetration of telephones was at 75% at this point). Well, we all know that this debate was resolved - partly due to time, and the move to universal phone ownership. We eventually reached a situation where random digit dialling could deliver reliable random samples.

Is this beginning to sound a little familiar? These are two of the issues that have also been raised about online research but, because we are more sophisticated nowadays, we also have some other questions about this whole area.

Over time, quality standards have been put in place to ensure the industry provides accurate and reliable results to its client base, and we have seen codes of conduct, ISO standards, as well as local initiatives (such as IQCS to control fieldwork in the UK). We do, therefore, expect the industry to regulate itself.

The growth of online research is well documented. Already in the US it is estimated that over one third of research by value is now conducted online, and approximately 7% in Europe. It is likely that it is the US model that European countries will adopt as internet penetration grows in Europe, although the rapid growth in the US has partly been driven by the increasing difficulty of conducting telephone research.

There are some differences in the type of research projects currently conducted online (see Table 1) but Europe is moving closer to the US model over time. Concept/Product Testing has increased as a proportion, although the Customer/Employee Satisfaction remains higher in Europe at the moment, and Sales Tracking has a much lower proportion in Europe.
<Table 1 here>

The US also demonstrates that most of the online research conducted there is based on the use of panels - in fact, 90% of studies use panels of some description (with client's own panels being the most popular source).

Originally, it was felt that online would replace studies traditionally conducted on the telephone, but we are now seeing it replacing other data collection methods as well.

In fact, our unique research study shows that most UK clients now see online as a viable option for most types of research, and expect to be using this data collection method more and more. So, one could ask "what is all the fuss about"?

Part 1 - The Research Buyer View

1.1 The impact of online research and its increasing acceptance

In May and June 2007, we interviewed a cross-section of 76 Research Buyers (i.e. client side researchers as opposed to agency researchers), and asked them about their general opinions regarding different data-collection methodologies and in particular, their opinions about online access panels.

The results from our Research Buyers survey show that UK Research buyers have embraced online research methodologies and in particular online access panels, as an interviewing method. More than 8 out of 10 of the research buyers we interviewed were already using online access panels for some studies and the majority expect their usage of these methods to increase over the next 12 months. Research buyers appear very willing to use online panels, with most (76%) agreeing with the statement; "I am happy to use online access panels". Likewise, only 1 in 10 agreed with the statement; "I try to avoid using online panel providers unless absolutely essential". Indeed, only around a fifth indicated that they would actively avoid using an online methodology if the survey was very high profile.

Current usage of online research methods on a project by project basis is already substantial. In their paper; "Online fights Back! - Combating communication fatigue with innovation"(2005), Thornton and Huflett suggested that online represented just under a third of projects commissioned, with a predicted increase to 40% in Europe by 2007. Our research supports these findings, although it suggests that the 40% level may be breached sooner than expected in the UK, with research buyers estimating that nearly 40% of projects commissioned over the past 12 months were done using online methodologies, including panels, pop-ups and email invites (see figure 1). Of course, this data is only an indication of the state and size of the market and does not attempt to account for spend or size of project. Nevertheless, the results give us a clear indication of the impact that online methodologies have had, especially when you consider that, at least on a number of projects basis, they account for more projects than either face-to-face or telephone.

<Figure 1 here>

Research buyers are increasingly willing to consider online access panels to deliver some of their largest, most strategic and high profile studies, with research buyers willing to consider online panels as a data collection methodology for: Customer

Satisfaction studies; Advertising Testing; Brand Tracking; and Concept Testing (see table2).

<Table 2 here>

In addition, most of the client side researchers we interviewed predicted that they will be increasing their usage of online access panels over the coming 12 months, particularly when compared with their expected usage of face-to-face and telephone methodologies. This is of course is extremely encouraging news for online research companies, particularly those who have already invested heavily in growing and maintaining quality online access panels

1.2 Research Buyers have some concerns about online access panels

Despite the predicted increase in the use of online panels, research buyers are concerned over quality control measures and the accuracy of results generated via online access panels. The Research Buyers Survey showed that the vast majority of research buyers consider themselves to be aware of the issues surrounding online panels (although very few were aware of ESOMARs 25 questions to ask an online provider). More than half of those interviewed think that, in general, research agencies and panel providers are not doing enough to understand the issues surrounding online panels. This view is compounded by the fact that three out of four agree that research agencies need to pay more attention to quality control when using online access panels.

When asked, the main concerns cited by research buyers about online access panels surround issues of bias and generating meaningful and representative samples. The comments below are made by some of the research buyers who took part in our survey and represent some of their most common concerns.

“My only concern is a bias in the results, as those on the panel are happy to be researched so not capturing views of those not on the panel”.

“That the panels are not representative of the target audience required - e.g. the difficulties in getting a representative sample of small business decision makers, rather than just those who have the time to complete a survey”

“My only concern initially with online panels is whether the respondents are representative of my target audience (i.e. are there enough older, lower social grade respondents), but this concern has lessened over time as internet penetration has increased”

Other notable concerns mentioned by research buyers focus on over-use of respondents, comparability with offline methods and security of sensitive client information.

“Confidentiality of what we are sharing in the survey is main concern. Applies to all quant methods but feels more scary on-line”

“Perhaps a slight concern that we might be talking to a panel of research experts. Also I believe there is variability in the quality of panels but I am comfortable that the panel we use is up there with the better ones”

“Their trackability with CATI interviews that tend to have been carried out previously in this field of research”

We were interested to assess whether research buyers were willing to trade off methodological concerns for quicker results and better value for money. To do this, we asked them to rate telephone, face-to-face and online access panel methodologies, for value for money, speed of turnaround and accuracy of results.

As one might expect, online access panels score very well when rated for value for money, with two-thirds giving a score of 8, 9 or 10 on a 10-point scale where 10 means excellent and 1 means very poor. To put this into some sort of context, just 20% gave an 8-10 rating for telephone with 12% doing so for face-to-face. Likewise, online panels also score positively for speed of turnaround. On this metric 83% of our respondents gave online a score of 8-10, compared with 32% for telephone and 9% for face-to-face.

However, the extremely positive ratings our respondents gave to online panels for value for money and speed of turnaround were not mirrored in the scores they gave for accuracy of results. In fact, by far the most positive score for accuracy of results was awarded to the most traditional of research methodologies; face-to-face, with telephone and online falling some way behind. Indeed, 22% gave online access panels what could reasonably be described as a negative score for accuracy of results (see table 3).

<Table 3 here>

In summary, the results from The Research Buyers Survey show that research buyers envisage placing an increasing emphasis on online panels, but also have a number of concerns regarding the validity of results and expect research agencies to do more to alleviate these concerns. Research buyers concerns regarding online access panels are, for the time being at least, being offset by the advantages of reduced costs and faster turnaround times (as well as other methodological advantages such as the ease in which images can be shown). Furthermore, it appears that many may be under increasing pressure from their own internal clients to bring projects in at lower cost and in shorter timescales, with almost a quarter of our respondents agreeing that internal clients are less interested in issues of quality control - they simply want their research done quickly and cheaply. Nevertheless, it is clear that research buyers are increasingly going to be looking to panel providers and research agencies to address their concerns.

1.3 How much is enough?

In The Research Buyers Survey, we took the opportunity to ask research buyers about two of the big issues regarding online access panels, namely; the issues of incentives and how often a panelist should be allowed to take part in an online survey.

The issue of incentives (i.e. how much to reward panelists and indeed whether to reward them at all), has been a serious topic of debate since online panels first started. On the one hand, some researchers are concerned that the payment of incentives may change the relationship between respondent and researcher and encourage “professional respondents”. On the other hand, others argue that we have a

responsibility to reward panelists fairly for their time and efforts, particularly if we want them to continue to respond to invites to take part in research and consider the questions and their responses carefully. Others, such as Peter Comley in his paper “Understanding the Online Panelist”(2005), suggest that a mix of rewards might be most appropriate, such as monetary rewards, prize draws and charity donations.

We asked our research buyer audience how much they thought it was reasonable for a UK panelist to receive for a 20-minute online consumer survey. The responses illustrate the different opinions that exist around this issue. More than 1 in 4 (29%) stated that £5 (€7.5) was a reasonable incentive for a 20-minute survey, 18% said £2 (€3) and 13% said that they did not believe it was a good idea to pay any incentives at all (see table 4).

<Table 4 here>

What is perhaps most interesting about this insight, is that the most common response given, £5 (or €7.5), is a sum that, to the authors’ best knowledge, is not being given on a regular standard basis to panelists by any panel company for a 20-minute online UK consumer survey (ICM, for instance, pays £4 or €6).

Whilst not rewarding panelists anything for their time may be preferable to some researchers, it would in practice make recruiting and maintaining large scale online panels very costly and expensive to use. Research by Nick Sparrow, published in his paper “Developing Reliable Online Polls”(2006), showed that most panelists join a panel as they think it is an enjoyable way to make money. The same research also showed that when panelists are asked whether they would rather do a more interesting survey that offers no reward or a less intriguing survey for £2 (€3), 80% opt for the latter, confirming that the desire to make money is the dominant motivation rather than a desire to register opinion. Furthermore, Peter Comley’s research in this area suggested that the most important improvements panelists said they wanted to see was to be paid cash for every survey they do. It seems therefore, that being on a panel and answering surveys is not just about the money for all panel members, but it is a significant influencing factor for the large majority.

Some researchers have put forward the view that, rewarding panelists fairly for their time is one amongst a number of factors that encourages panelists to read questions thoroughly and consider their responses, as it makes for a more fair and equitable relationship between respondent and researcher. But what do research buyers think about this? The Research Buyers Survey showed that opinion is split practically down the middle on this issue, with 46% of research buyers saying that they think the level of reward a panelist receives does make a difference to how well they read questions and consider their responses and 54% do not.

Further research is required in this area to establish the impact the level of incentives has on a respondents answers and more importantly the impact it has on the quality of their response.

1.4 How often is too often?

How often panelists should be allowed to complete interviews is another question that has been widely discussed and debated by the research industry. Again, as with the level of incentives, there seems to be little agreement amongst research buyers as to how frequently panelists should be able to take part in surveys. The most common response to this question was once per month (43%), although 29% felt more frequently - a few times per month - was reasonable and conversely a similar proportion (26%), felt that panelists should only be allowed to take part in surveys less often than once per month, with most of these opting for about once a quarter.

However, as Comley's research shows, most panelists (87%) want to complete surveys at least once a week with 30% saying at least daily. Controlling the amount of surveys panelists complete is one solution, but this will not deter a determined panelist from joining several panels and multiple panel memberships is commonplace. Without increased collaboration between panels it will be difficult, if not impossible, to control and monitor the amount of surveys a respondent completes.

In summary, the research industry needs to provide more guidance to research buyers on this issue and make a strong case for what is the appropriate level of interviews a panelist should do and how this can be controlled for, especially when panelists are often on more than one panel. Indeed, perhaps we need to establish a central database of online respondents so that we can effectively control usage and adopt common incentivisation policies? At the very least, we should be able to share information on "rogue" responders and permission to share such information should form part of the terms and conditions for all panel members.

Perhaps we should keep in mind what has happened in the US. As Gian Fulgoni (Chairman, comScore Network Inc) stated at CASRO (Council of American Survey Organisations) conference in October 2006 in Los Angeles: 10% of respondents account for 80% of survey responses (and 1% account for 34%).

Part 2: An examination of panel bias, response rate bias and mode effects

The second half of this paper is given over to a consideration and exploration of some of the issues and concerns related to those raised in The Research Buyers Survey, namely:

1. Panel bias - who joins a research panel
2. Response rate bias - who responds
3. Mode bias - do people respond differently when asked the same questions online and over the telephone and the impact of stylistic variations

It will examine the results from several pieces of original research and analysis conducted by ICM Research and MSTs.

2.1 Who joins an online research panel?

The Research Buyers Survey showed that one of the main concerns for research buyers is the ability of online access panels to generate representative samples. To test this, we contacted a nationally representative sample of 7210 GB internet users and asked

them whether they would be willing to join an online access panel. The results of this work show that 1 in 5 said they would be willing to join an online research panel, however demographic sub-cell analysis by age illustrated key differences. Those who were younger were significantly more likely to say they were interested in joining a research panel (25% of those aged 18-24), with a substantially smaller proportion of those aged over 45 agreeing to join and with low interest most acute amongst those aged 65 and over (see table 5).

<Table 5 here>

A similar, though less pronounced bias can also be seen when we examine the working status of those who are willing to join an online research panel. Analysis by working status showed that those who are retired or not working are significantly less likely to agree to participate in an online panel than those who are students or who are working (see table 6).

<Table 6 here>

In summary, even if an online panel is actively recruited offline, using nationally representative sampling methods, it will still ultimately suffer bias in terms of who is interested and willing to take part. Research agencies need to recognise and understand the ways in which panels are biased and set appropriate quotas on all surveys to ensure that representative samples are generated of the market in question.

2.2 Which panelists respond to invitations to take part in research?

One method researchers use to try and control the effects of panel bias is to send out email invitations to online panelists in proportion to the known profile of the market in question. However, an examination of those who respond to panel invites illustrates that simply sending out invites in proportion to the known population and not setting fixed quotas, may not be enough to create a representative sample. This is because some panelists respond quicker than others to invitations to take part in research. We examined 1,000 online responses to see if we could establish any patterns as to who responded quickest to email invites. In our test, overall quotas were set to ensure that the final sample would have the correct representative distribution of men and women and email invites were sent out to panelists in representative proportions. This research clearly showed that women were quicker to respond than men (see figure 2). Therefore, unless quotas had been set on gender, the sample achieved would have been biased towards women, not only because they may make up a disproportionate amount of the panel in question, but also because they respond quicker to invites than men.

<Figure 2 here>

The Research Buyers Survey showed that there is a concern about whether online access panels can generate representative unbiased samples. Our research shows that they are right to be concerned. Online panels, whether recruited online or pro-actively offline, are likely to be biased towards certain types of people. Furthermore, our research shows that some types of panelists respond quicker than others. This leads to the inevitable conclusion that if online panels are to generate representative unbiased samples, then it is imperative to set a range of relevant and sensible quotas across a number of variables. This may well involve a greater investment of time at

the start of each project, in understanding the market in question and agreeing the most relevant quotas for the particular study (in some cases this may involve conducting preliminary research using Nationally Representative Omnibus studies to create sample frameworks) . It may also involve allowing enough time in field for a variety of respondent types to have an opportunity to take part in the survey. In short, it may involve a re-evaluation of the speed, value, cost trade off.

However, research has shown that whilst we can set quotas to create representative samples online, this in itself may not be enough to ensure that the responses of online panelists match those obtained from large scale random probability surveys and that there are inevitable differences that occur as a result of mode effects.

2.3 Examining Mode Effects - Do the same respondents give different answers to the same questions?

In his paper “Developing Reliable Online Polls”, Nick Sparrow set out evidence of significant and disturbing mode effects between on and offline methodologies. The findings suggested that the research industry needed to create methods to ensure online respondents carefully consider their answers and design questions that do not inadvertently lead online respondents to give certain responses.

To explore this subject further, we set up two experimental tests to assess whether the same people respond differently when answering an identical set of questions using different data collection methods.

The tests were:

Test 1 - telephone and online

Test 2 - online and paper

Test 1

For this test we contacted a total of 343 respondents and interviewed each person twice. The total sample was split into two demographically similar groups; Group A and Group B. Group A completed the online questionnaires first and Group B did the telephone interviews first. They were then re-contacted a week to ten days later and Group A completed the telephone interview and Group B the online interview. This allowed us to account for any impact that the timing of the two waves may have had.

Groups A and B were further subdivided into two equal groups, hence a total of four respondent groups were created; A1, A2, B1 and B2. Groups A and B were subdivided so we could also test and examine the impact of asking the same questions using two visually different online templates; a “Flash Template” and a “Standard Template”. The Online Flash template is considered by respondents to be a much more enjoyable method of completing surveys, as it is visually stimulating and more engaging (see figure 3). In fact, those who complete the Flash Template version of the questionnaire are much more likely to say that they would respond to invites more often if all online surveys were presented this way, which shows that creating engaging surveys is a worthwhile investment. The Online Standard template was the more common tick box / radar style design.

<Figure 3 here>

Table 6 illustrates the methodology used and the number of interviews achieved in each cell, as well as the order of the completed interviews for each of the four groups.

<Table 7 here>

Panelists were rewarded for taking part at our standard rate of £1 (€1.5) per 5-minutes of interview time and the online questionnaires utilised the question stalling technique we use on all online surveys to promote considered responses. This stalling technique enables us to present a question to a respondent first and then, after a 3-second pause, the answer codes. This means that the panellist cannot just click through the survey quickly and that they are encouraged to consider the questions properly. In addition a number of quality control questions were added to ensure respondents were giving answers that were consistent. Any respondents found to be giving opposing answers to the catch questions were removed.

The full questionnaire took approximately 5-minutes to complete. For the purposes of this paper, we will focus on just two batches of the questions:

1. Net Promoter Score style ratings of service providers (3 questions)
2. 10-point attitudinal rating questions (10 questions)

The questions were designed so that they would not obviously favour one mode of questioning. For analysis purposes, the batches of questions were rolled together (i.e. the 7 attitudinal measures were merged and 3 Net Promoter Score “NPS” ratings). This allowed us to examine overall response styles rather than just looking solely at responses to individual questions.

Initially we examined the differences in responses between each of the waves of telephone interviews. This showed that there was a great deal of parity between the groups for their telephone responses (see table 8).

<Table 8 here>

Having established levels of consistency between the two waves of the telephone interviews, we went on to test, at an overall level, the extent to which the results from the telephone and online interviews matched. The results showed that whilst there was a great deal of similarity, there was a significant difference in their answers to the attitudinal questions (see table 9).

<Table 9 here>

Further analysis of the individual attitudinal scores at each point of the scale also highlighted some interesting differences. The telephone responses to the attitudinal questions tended more towards a mid-point score of 5 out of 10 (18% for online responses compared to 3% for telephone), whilst online respondents appeared to move more towards 9 or 10 out of 10 (18% for online compared to 13% for telephone).

So the results between the online and telephone interviews differed significantly, people were responding differently to exactly the same questions. This raised the question as to whether specific questions were driving the difference, or was it due to one of the different stylistic templates or some order effect?

The first hypothesis we tested was whether the Flash or Standard templates had affected the way respondents answered the questions. Table 10 shows that the differences between the two online templates and the telephone answers were fairly consistent, they were not significantly different.

<Table 10 here>

Our next test was to look at the consistency of the responses over the two waves of interviewing and here we saw some intriguing trends in the data. Those who did the online survey first gave more consistent answers in the telephone call back interview, regardless of whether their first response was given on the Flash Template or the Standard Template. A bigger shift in responses was noted amongst those who did the telephone interview first and then the online survey, particularly for the attitudinal questions (see table 11).

<Table 11 here>

It is hard to definitively establish why this occurs, although two reasonable hypotheses are that respondents remember their answers better if they have given them online first or give a more considered response when answering online, which once considered is then easier to recall in the subsequent telephone interview. Telephone interviewing may result in a more top of mind answer, though that is not to say that a top of mind response is any less interesting or relevant than a more considered response.

A further review of the responses by the different templates tested showed the most acute shift occurred between those who did the telephone interview first and then went on to complete the Standard Template online. Amongst this group we saw a shift of 7%-points on those scoring 8 to 10 out of 10 and 12% points on those scoring 1 to 5 out of 10 for their responses to the attitudinal questions.

A detailed consideration of the individual questions shows that some respondents do change their answers, both in test groups A and B. However, again we noted the greatest mode effects occur around those who completed the telephone interview first and then completed the online interview - particularly for three attitudinal measures: *There is too much fuss made about the environment these days; There is too much fuss made about healthy eating these days and I have a good work life balance.*

<Table 12 here>

These results suggest that researchers increasingly need to understand, recognise and accept the impact that mode of interview has on a way a respondent answers questions. Furthermore, that re-creating the same results using different methodological approaches may not always be a realistic or an appropriate objective. Instead effort should be made to investigate further the reasons for mode differences and aim to understand the underlying patterns of behaviour behind them. This of course is particularly interesting in the light of research buyers willingness to consider switching projects to online methodologies and the implications for understanding the results, especially around the point of transition. It also strongly suggests that continued switching between methodologies should be avoided.

Test 2

In addition, we conducted a parallel test of two food concepts, run both online (using a panel) and using pen and paper in a central location, to understand any differences

in the results. In both cases, a photo and description of the concept was provided to the respondents, and they completed a self completion questionnaire.

Based on previous experience, we were expecting differences in the results by method, as the hypothesis is usually that people who are at home give more “honest” or realistic opinions of measures such as likelihood to buy than when they are in a “testing” environment. In the past, we have tended to see that the key scores for concepts tested online are lower than face to face.

This time, however, we did not see that effect (see Table 13). There were no significant differences in any of the mean scores across the various measures for either of the concepts tested. We used sample sizes of 150 housewives for each cell, and the concepts were tested monadically.

<Table 13 here>

This suggests, perhaps, that online has come of age? The comparison was a fairly robust test, and the results came out as very similar to traditional methods. However, we should note that the paper and online interviews are both self-completion and this may reduce the mode effect when compared to interviewer administered.

Implications

Our research demonstrates that the industry is increasingly willing to consider online access panels as a data-collection methodology and also for some of its most important studies. Whilst at face value the industry appears to be both willing and happy to use online access panels, practitioners do have a number of concerns about using them and expect the industry to be investing more time and resource in understanding and addressing a range of issues.

This paper has shown that concerns over issues of sample bias are well founded. Online access panels, even when recruited pro-actively offline, are likely to over-represent certain sub-groups of the population. Furthermore, some types of respondent respond to invitations quicker than others. This suggests that sensible quotas, based on known market profiles, should be applied to all online research conducted using an online access panel, if we are to ensure that the achieved results do not over represent some respondents whilst under-representing others.

Our studies have also highlighted some of the issues around comparing online and offline results and that different interviewing methods can generate different responses. Therefore, even with a professionally constructed sampling frame it is unlikely that online responses will completely match those generated offline in interviewer administered surveys, although this does not necessarily mean either is incorrect.

These findings suggest that the research industry needs to devote more time and resource to understanding mode effects in more detail. Investigations are required to fully understand why some respondents change the way they answer questions when asked exactly the same question via two-different interview methodologies (i.e. telephone and online), especially as many research buyers are considering switching studies from telephone to online.

It is imperative that as researchers we solve these issues, since the research industry will be looking increasingly to online panels as one of the key data-collection methodologies and to deliver some of the industries most high profile projects.

Concluding Remarks

The use of online research is growing fast, and the Net represents a rich interviewing tool full of possibilities, but there are issues to be resolved.

The US seems to have ducked the issue so far, so will we fare any better?

In September '06 there was an, IIR Research Industry Summit on Improving Respondent Co-operation held in Chicago, and quality of online responses was a major issue that was discussed. However, despite much wringing of hands by both agencies and clients, no agreement was reached on what to do, who should do it or how it should be funded.

We really need to do it, and do it now!

We want to put out a rallying call for researchers in Europe to sort it out - the clients appear to want us to, and we want to continue to offer "proper" research to maintain confidence in our industry. We are already being attacked by others (e.g. consultants) so we need to protect our position.

In response to some of the issues raised, ESOMAR are conducting an initiative to produce standards for the use of online panels, and we welcome this as part of the first steps that the industry needs to take to maintain quality and re-assure the clients of the validity of this research method.

References

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- Thornton, R. and Hufflett, T. (2005); Combating Communication Fatigue with innovation; ESOMAR, Annual Congress; Cannes

Notes & Exhibits

FIGURES

Figure 1: Relative shares of research projects commissioned using each data collection methodology.

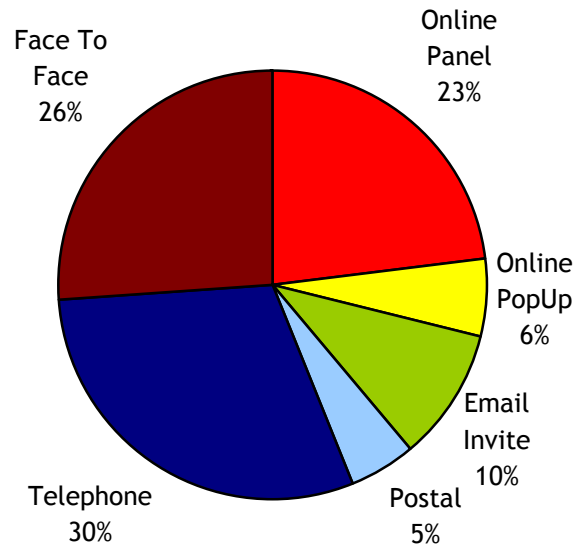


Figure 2:
The proportion of responses by women compared to invites sent out

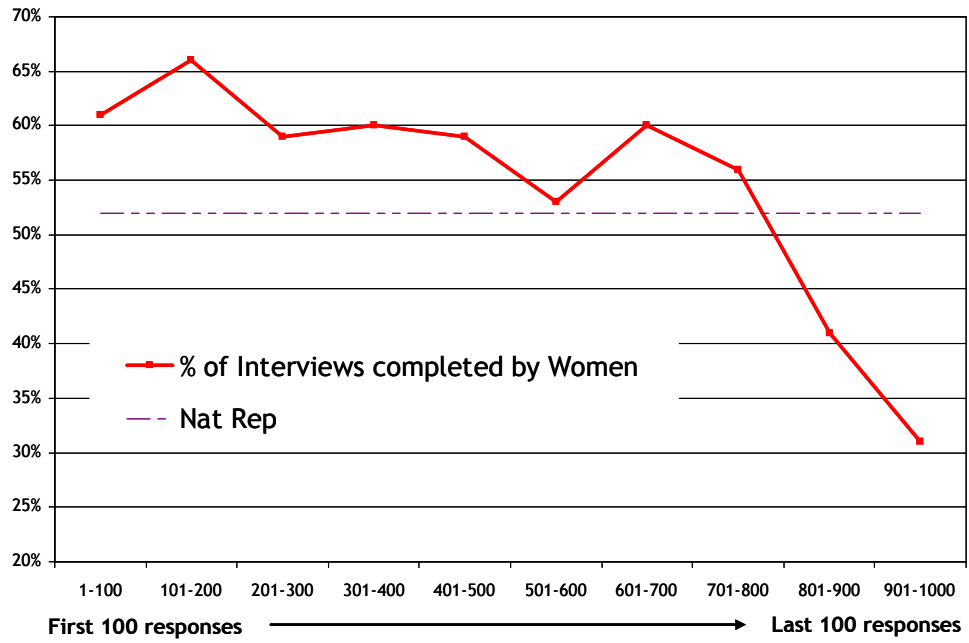


Figure 3 - Examples of Flash interviewing template

The image displays two examples of a Flash interviewing template. Both examples feature the 'newvista' logo in the top right corner.

Top Screenshot: This screen shows three Likert scale questions. Each question has a horizontal bar with numbers 0 to 10, where 0 is red and 10 is green. Below each bar are radio buttons for 'DK' and 'N/A'. A progress bar at the bottom indicates 12% completion.

- Question 1:** "On a scale of 0-10, where 0 means you would definitely not recommend and 10 means you would definitely recommend, how likely is it that you would recommend your bank to a friend or colleague? If you have more than 1 bank then please just answer for your main bank." The scale shows a value of 5.
- Question 2:** "On a scale of 0-10, where 0 means you would definitely not recommend and 10 means you would definitely recommend, how likely is it that you would recommend your mobile network provider to a friend or colleague? If you have more than 1 network provider then please just answer for your main provider." The scale shows a value of 9.
- Question 3:** "On a scale of 0-10, where 0 means you would definitely not recommend and 10 means you would definitely recommend, how likely is it that you would recommend your mobile phone handset to a friend or colleague? If you have more than 1 handset then please just answer for your main handset." The scale shows a value of 1.

Bottom Screenshot: This screen shows four semantic differential questions. Each question has a circular gauge with numbers 1 to 10. Below each gauge are radio buttons for 'DK', 'N/A', and 'Refused'. A progress bar at the bottom indicates 40% completion.

- Statement 1:** "There is too much fuss made about the environment these days." Gauge shows 7.
- Statement 2:** "There is too much fuss made about healthy eating these days." Gauge shows 5.
- Statement 3:** "I am very concerned about the levels of migration into the UK." Gauge shows 7.
- Statement 4:** "These days it's more important to get a job or a trade than to go to University." Gauge shows 2.

TABLES

Table 1:
Estimates of the breakdown of types of online research conducted in Europe and the US in 2006

	US	Europe
	%	%
Concept/Product	31	25
Sales Tracking	17	6
User Usage & Attitude	13	12
Advertising/Brand Tracking	11	13
Customer/Employee Satisfaction	8	18
Copy Testing	6	6
Site/User Evaluation	4	5
Opinion Polling	2	7
Qualitative	2	2
Others	6	6

Source: Inside Research newsletter February 2007

Table 2: Consideration of online access panels for different types of study

	Brand health / Brand Tracking	Concept Testing	Product Testing	Ad testing	Pack test	Employee satisfaction	Customer Satisfaction / Commitment studies	Other Ad-hoc projects
Base	70	69	66	70	52	70	67	53
NET: consider	87%	83%	56%	86%	63%	86%	100%	15%
Would definitely use an online panel	34%	17%	6%	29%	6%	29%	18%	4%
Would consider using an online panel	53%	65%	50%	57%	58%	57%	82%	11%
Would definitely NOT consider using an online panel	13%	17%	44%	14%	37%	14%	-	85%

Table 3:
Ratings of different data-collection methodologies for value for money, accuracy of results and speed of turnaround

	Value For Money			Accuracy Of Results			Speed Of Turnaround		
	Telephone	Face To Face	Online Panels	Telephone	Face To Face	Online Panels	Telephone	Face To Face	Online Panels
Base	74	74	74	74	74	74	74	74	74
8-10	20%	11%	66%	36%	64%	26%	32%	8%	85%
1-5	11%	47%	9%	12%	5%	23%	14%	45%	1%

Table 4:
The levels of incentives Research Buyers think should be rewarded to panelists for a 20-minute UK consumer survey

£10	£5	£4	£3	£2	£1	50 pence	25 pence	None - its not a good idea	Don't know
4%	28%	3%	11%	18%	7%	1%	1%	14%	8%

Table 5:
The percentage of respondents who are willing to join an online access panel

	Total	Male	Female	18-24	25-34	35-44	45-54	55-64	65+
Base	7210	3417	3793	695	1327	1691	1540	1223	734
Yes	19%	21%	18%	25%	26%	20%	17%	15%	10%

Table 6:
The percentage of respondents who are willing to join an online access panel

	Total	Retired	Working	Not working	Student
Base	7210	1108	4808	936	346
Yes	19%	13%	19.6%	24%	25%

Table 7:
Outline of survey methodology for respondent survey

Group	Telephone	Online - Flash	Online - Standard
A1	1 st (83)	2 nd (83)	-
A2	1 st (88)	-	2 nd (88)
B1	2 nd (86)	1 st (86)	-
B2	2 nd (86)	-	1 st (86)

Table 8:
Net scores for combined questions, comparing both sets of telephone responses

Group	Telephone Group A	Telephone Group B	Difference
Base for 3 NPS Questions	513	513	-
Net score 8-10 / 10	51%	48%	-3
Mean score	7.09	6.83	-0.26
<hr/>			
Base for 7 Attitudinal Questions	1197	1197	-
Net score 8-10 / 10	22%	23%	+1
Mean Score	4.93	4.98	+.05

Table 9:
Net scores for combined questions, comparing all telephone and all online responses

Group	ALL Telephone	ALL Online	Difference
Base for 3 NPS Questions	1026	1026	
Net score 8-10 / 10	49%	46%	-3
Mean score	6.96	6.76	-0.2
Base for 7 Attitudinal Questions			
Base for 7 Attitudinal Questions	2394	2394	-
Net score 8-10 / 10	23%	26%	+3*
Mean Score	4.95	5.11	+0.16

Table 10:
Net scores for combined questions, comparing telephone responses with responses on different online templates

	All Telephone who also did Flash Online	All Flash Online	Difference		All Telephone who also did Standard Online	All Standard Online	Difference
Base for 3 NPS Questions	506	506	-		521	521	-
Net 8-10	48%	44%	-4%		51%	47%	-4%
Mean score	6.81	6.52	-0.29		7.11	7.01	-0.10
Base for 7 Attitudinal Questions	1179	1179	-		1214	1214	-
Net 8-10	24%	27%	+3%		21%	25%	+4%
Mean Score	5.03	5.12	+0.09		4.88	5.10	+0.22

Table 11:
Net scores for combined questions, illustrating order effects

	CATI 1 st	Online 2 nd	Difference		Online 1 st	CATI 2 nd	Difference
Base for 3 NPS Questions)	513	513			513	513	
Net 8-10	51%	46%	-5		48%	45%	-3
Mean score	7.09	6.84	-0.25		6.83	6.69	-0.14
Base for 7 Attitudinal Questions	1197	1197			1197	1197	
Net 8-10	22%	27%	+5%		23%	25%	+2
Mean Score	4.93	5.26	+.33		4.98	4.96	+0.02

Table 12:
Net score differences for individual attitudinal questions, comparing sets of telephone responses

	Telephone 1 st then Standard	Telephone 1st then Flash	Flash 1st then Telephone	Standard 1st then Telephone
Base sizes	83	88	86	86
Too much fuss made about the environment these days				
Diff. on Net score 1-5	14*	6	-4	1
Diff. on Net score 8-10	-11*	-7*	2	-2
Too much fuss made about healthy eating these days				
Diff. on Net score 1-5	16*	13	-10	-3
Diff. on Net score 8-10	-6	-8	9	9
I am very concerned about the levels of migration into the UK				
Diff. on Net score 1-5	5	5	-2	-5
Diff. on Net score 8-10	-6	-11	10	2
More important to get a job or a trade than go to university				
Diff. on Net score 1-5	10	13	-10	-8
Diff. on Net score 8-10	-5	3	1	1
I follow politics and current affairs closely				
Diff. on Net score 1-5	14	-6	2	6
Diff. on Net score 8-10	-7	0	-2	-2
Religion is an important part of my life				
Diff. on Net score 1-5	8	2	4	-2
Diff. on Net score 8-10	-4	-2	-2	-3
I have a good work life balance				
Diff. on Net score 1-5	17*	-2	6	-9
Diff. on Net score 8-10	-5	5	-1	4

Table 13:
Mean scores from Food Concept tests run on paper and online panel (both self-completion)

	Concept A		Concept B	
	Paper	Online Panels	Paper	Online Panels
Base	150	150	150	150
Overall Opinion (9 point)	7.05	7.21	6.63	6.87
Uniqueness (5 point)	3.65	3.83	3.33	3.61
Relevance (6 point)	4.09	4.12	3.96	4.15
Likelihood to buy (5 pt)	3.62	3.57	3.68	3.81
Recommendation (5 pt)	3.71	3.69	3.54	3.67