

MORE DIRTY LITTLE SECRETS OF ONLINE PANEL RESEARCH

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INTRODUCTION

Imagine holding a set of in-person focus groups. You watch as a participant checks in at the front desk. “Hi, Angela,” says the facility hostess. “Back again today? What is this – five groups this week for you?”

The hostess then proceeds to inform all the participants of the rules. “You’ll be paid four dollars per hour for your time,” she says. “Once you’re done with the first group, just go to the next room for your second and third groups, after you sit through a five-minute sales pitch for car insurance. We promised you each group would be no more than two hours, but the first one will actually last for three hours. Oh, and even though you’re all nurses, the group will be about automotive repair. Here, have a warm 7Up – and by the way, the second group will be for Sprite.” The hostess then turns to you, the moderator, smiles sweetly, and says, “They’re all yours.”

Absurd, you say. No one would ever treat respondents like this and expect thoughtful answers and willing participation out of them. They’ll be tired, surly, disgruntled, biased, and just looking to get the whole thing over with as quickly as they can – assuming they don’t just walk out.

Why do you care whether research participants are treated well, have their time respected, are not pre-biased, are asked about relevant topics, and are not professional respondents? *Because you are depending on their answers to help you accomplish your business goals.*

You are depending on these respondents to help you accomplish your goals

So why do we as researchers turn to online panels to get critical feedback, and not care what the respondent experience is like? Are they rushing through your questionnaire or giving it thoughtful answers? Have they completed four similar surveys in the past week, so they are pre-biased on what to look for in yours? Has your sample been skewed by someone else’s questions before yours are even asked? Are respondents frustrated at multiple closed surveys, and evaluating your product concept while quite annoyed? Is yours the tenth study they’ve completed today?

Online panel surveys obviously are not the same as focus groups, but researchers and our clients are still depending on these individual participants to give us accurate, thoughtful answers so we can make intelligent decisions. It’s a cliché, but it’s true: Garbage in, garbage out.



BACKGROUND

Our 2009 report *Dirty Little Secrets of Online Panels* caused quite a stir. It burned up Twitter feeds, got discussed extensively on professional sites such as LinkedIn, and was requested by hundreds of researchers, both on the client side and the vendor side. We received requests from 18 countries from Finland to South Africa, as well as most of the states in the US. Our report was translated for distribution in the Czech Republic, and used in the research coursework at the University of Trieste, Italy.

It seems the original report, which raised serious questions about the quality of what some online panels were providing in the name of “research,” hit a nerve because it quantified what many researchers were already experiencing (at least judging by the comments we got):

- “It sounds like at long last, someone has had the guts to find out and report on what we all knew was happening but didn’t have the evidence to prove.”
- “I have done much of the same monitoring of panels from both the Respondent and Data Collection side and have likewise found some very, very, very disturbing issues. Many of which are not public only because of the lawsuits they would bring.”
- “Would love to have a copy of the report, especially to understand if US based panels are any less dysfunctional than many European ones.”
- “Thanks in advance for your work and my copy...am seriously a little bit nervous about what I might learn (and probably always knew).”
- “I agree on many of the points you mention. There’s a lot of ‘dubious’ sample out there and a lot of trends in our industry that are rewarding the most dubious practices.”
- “As a research consultant (and former employee of a major panel company), I have had these concerns for years.”
- “I’ve been a mystery shopper-slash-multiple panel member for a couple of years now and have seen the practice deteriorate, so I’m not surprised. The scary bit is that it appears to me to be some of the largest and most renowned access panel providers that perform the worst. Sometimes I really wonder who is taking all those terrifying 45 minute studies – often with little or no incentive attached. I still haven’t fully figured out whether some clients just don’t care all that much, or whether they are truly not aware of what exactly they’re wasting their money on?”

“As a...former employee of a major panel company, I have had these concerns for years”

We also received plenty of questions about panels that were not included in the original report. “Why did you exclude e-Rewards?” “We use Synovate a lot – how did they do in your test?” “Can you do this again but include Clear Voice?” On top of that, the panel landscape has changed since 2009. SSI and Opinion Outpost merged. Toluna acquired Greenfield Online. A few newer panels emerged as significant players in the industry.

Given the interest in our last report, plus the number of panels we simply did not have the time or the resources to include in 2009, we decided to do this again. We included a set of ten panels that weren't included previously:

- Clear Voice
- e-Rewards (Research Now)
- Global Opinion Panels (Synovate)
- MySurvey (Lightspeed)
- NPDOR (NPD Group)
- Opinion Place (DMS/uSamp)
- Springboard America (Vision Critical)
- Survey.com
- Surveyhead (uSamp)
- Valued Opinions (Research Now)

Because of the mergers, we also ran a second test on two panels that were included in our previous report: Toluna and Opinion Outpost (SSI). Would the recent mergers impact the respondent experience?

We employed the same basic methods as in the previous study. We had individual consumers sign up for a variety of panels. We made sure to include both men and women on every panel, because our previous work showed that the number of opportunities often varied substantially by the gender of the panel member.

Shoppers were given the following instructions:

- Provide full profiles for each panel
- Respond to each invitation within 72 hours, at the very latest (the average gap between when the invitation was received and when our panelists responded was 16 hours, 58 minutes)
- Provide honest answers to every questionnaire – do not try to qualify for studies if you don't really qualify
- Only respond to studies for which you actually receive a survey invitation by e-mail – not those which may be available on the panel's website
- Do not participate in any qualitative research that is being recruited through a panel
- Carefully track what happens with each survey invitation over one full month (after some time was allowed after sign-up for each panel to "ramp up" with the new member)

We should point out that this is not a statistically representative sample from each panel, but a representation of *typical* experiences. Our goal was not to say that one panel sent 22 invitations and another only sent 21 – it was to evaluate these panels from the viewpoints of the people who are participating in studies. *Your* studies.

Note that membership in MySurvey and e-Rewards is by invitation only. We located and included shoppers who were existing members of these panels. Opinion Place is not technically a panel, in that DMS funnels river sample through this site, but it does offer people the ability to sign up and provide a profile, so we treated it as a panel (because that's how it appears to anyone who signs up). NPDOR is a specialty panel, in that it marries respondent data with point-of-sale data. Respondents are regularly asked about their purchase and consumption experiences, but are unlikely to receive questionnaires about topics such as insurance advertising or politics.

As we did in the last report, we have chosen not to identify each panel by name in this edition. Our purpose in this study is not just to single out particular panels for praise or criticism, but to demonstrate how critical it is for you to know the details about the panels you choose for your projects. In addition, we simply don't have the resources or the desire to fight lawsuits or smear campaigns which might result from a panel provider being singled out and criticized by name. We already came in for our fair share of objections from some panel providers regarding the last report (as well as praise).

We also have concentrated on providing *information* on the experiences, rather than just judgments. There are a lot of opinions in the research world about what makes for quality online panel research. Some readers may be very concerned if respondents are getting minuscule incentives on one panel, while others may feel this is irrelevant to data quality.

There are situations in which we will provide qualitative comments about the findings – for instance, a panel that offers members the opportunity to compare car insurance rates under the guise of a “survey” is simply unethical, in the view of Grey Matter Research – but it's also important that you as a researcher have the supporting data so you can be informed about what's taking place out there, and decide what are the criteria *you* are most concerned about in selecting a panel provider.

Finally, we want to make it very clear that the respondent experience as described in this report is most definitely *not* the only criterion to use in selecting panel sample. Other issues are also highly important: recruiting practices, data replicability, pricing, service, profile thoroughness, etc. This report is only one measure by which panels should be judged – although it's an important one.



WHAT WE FOUND OVERALL

The most basic conclusion of this effort is that panel sample is absolutely *not* a commodity. Panels varied dramatically in the type and value of incentives they offered, the number of opportunities they gave panel members to complete studies, what they communicated to panelists about those studies, and many other things that can impact your research. In the next section, we'll show what happened with each individual panel in the test.

But there were some common problems that impacted panel research in general, rather than just one or two panels. Some of these issues cannot be directly pinned on the panel providers, since they are simply serving as conduits for what their clients are demanding. Instead, it's the clients who need to take a close look at what they are asking panel companies to do.

WHO IS ACTUALLY PROVIDING YOUR SAMPLE?

There was tremendous cross-usage from one panel to the next. Our panelists completed studies for Harris Interactive, uSamp, Market Tools, Ipsos, GMI, Survey Sampling, Federated Sample, EMI, Opinion Outpost, Lightspeed, Paradigm, Sample Strategies Global, Authentic Response, Clear Voice, and Toluna (which all broker panels or have their own panels) – all invitations funneling through just one panel.

When you choose Valued Opinions (or Toluna, or anyone else), are you really getting Valued Opinions sample? Or is Valued Opinions getting some of your sample from another panel – maybe a panel you don't feel offers good quality, or one with which you are unfamiliar? If you haven't had this conversation with your researcher or your panel provider, it's time to do so.

There was tremendous cross-usage from one panel to the next

"SORRY – THIS SURVEY IS CLOSED"

One common problem that we also saw in our 2009 test was how quickly studies closed. In phone research, it's long been considered a standard to make at least three attempts per number, so the survey is not a convenience sample of people who are more likely to be home all the time. Yet on average, 23% of the studies we attempted across all 12 panels were closed, even though every invitation got a response within 72 hours of receipt.

In fact, the studies that closed did so after an average of just 21 hours and 44 minutes (the true average is actually less than that, given that this number represents how long it took our panelists to attempt them and find they were already closed).

We had multiple studies close in less than an hour, and many more close in just a few hours. Some would close overnight, with an invitation arriving late in the evening, and the study being closed by very early morning. How valid is a sample of people taking surveys between the hours of 10:00 pm and 7:00 am the following day?

Twenty-seven percent of the studies that were closed were closed in under eight hours. A total of 63% of the closed studies were kept open for less than 24 hours before closing.

We have no way to know whether these closed studies reflect decisions of the client or the panel company. And certainly there are times when a study must be in and out of the field quickly, such as gathering attitudes about a PR disaster or a major news story. But 23% of studies being closed, when the average overall response time for our panelists was just under 17 hours?

On average, 24% of the studies we attempted were closed, in an average of less than 24 hours

And if the panel providers are not at least partially responsible for this, what else would explain the fact that one panel had over four out of every ten studies closed, while three other panels had not a single closed study?

Whether this is mostly the fault of panel companies or clients, this seems like a major industry-wide shortcoming. A common criticism of panel research is that the same few people are completing surveys over and over and over again. But closing studies with very little field time just amplifies this problem, making it even more likely that the same few panelists will be participating over and over.

When you work with a panel provider, or a research company that subcontracts to one, are you coordinating reasonable field times with the research provider, or just letting them handle it?

THE PRIMING EFFECT

Some panelists received the same basic questionnaire or research approach multiple times from the same panel, but for different products. This was particularly common with advertising, for which some companies have standard methods for online testing.

One panelist recounted being presented with a series of ads, and then being asked the same questions about each one of those ads: who the ad was for, whether it would influence their behavior, how they felt about the sponsor, whether the ad fit a number of attributes (amusing, informative, believable, etc.). Even the question to check for cheating (e.g. “Please enter a 7 for this question”) was the same each time. After doing this a couple of times, the panelist knew what he was supposed to be looking for in order to answering the subsequent questions. In other words, for the first advertisement, the respondent simply watched and evaluated the ad based on its own merits. By the third and fourth ads, the respondent knew he was going to be asked first who the sponsor of the ad was, and what the attributes were, so he paid special attention to those things.

That effect might be mitigated by rotating the presentation order of the ads within one survey, but that’s not the only problem. The same panelist completed three more questionnaires during the test month using the exact same process (even the same question wording and attributes) for different product categories. He entered each study

knowing what to look for, so undoubtedly things such as brand recall numbers from each ad are substantially inflated.

QUESTIONNAIRE LENGTH

Without a doubt, questionnaire length is an issue with all forms of research, not just panels. But somehow, clients often seem to feel more freedom to make demands for very long questionnaires when they're administered online. The average questionnaire in our study lasted for 18.3 minutes. We had invitations for surveys up to 80 minutes in length, and 30 to 40 minutes was not a rarity. In fact, 48% of all invitations we received were for questionnaires of 20 minutes or more, including 13% that were 30 minutes or more.

49% of all invitations
were for surveys of 20
minutes or more

On any given study, a researcher might argue that 30 minutes is necessary to achieve their information objectives. But on one out of every seven or eight studies? Is that kind of length wise, especially considering how many respondents might be completing your study as the fourth one they've done today, and the fifteenth this week?

QUESTIONNAIRE QUALITY

Simply put, it was horrifying to see the quality of many of the questionnaires. Our panelists were sometimes forced to lie in order to continue with a survey, because no available answer was correct. Some other examples that should embarrass the industry:

- One panelist answered that he did not own a smart phone, and was subsequently asked multiple questions about his activity downloading apps and videos on his phone.
- One questionnaire asked the panelist what he collects, and provided 15 different obscure options (things such as coins and stamps were not included, but dog tags and wallpaper were). The panelist had to say he collected at least one of the bizarre items in order to continue with the questionnaire, which then asked multiple questions about his collection.
- One study asked a frequent traveler highly specific details about his last ten hotel stays. Rather than completely falsify data he had no hope of remembering, he was forced to abandon the survey.
- Our panelist had to re-read this one numerous times: "Do you personally drive a car, owned by you or someone else in the household respectively used by you as a company car?" The same questionnaire later asked, "Could you now consider your first car / the car which will replace your currently most driven car – when are you likely to buy this car?" (To add insult to injury, this questionnaire lasted over an hour and had many other questions with this level of tortured English.)
- One questionnaire asked our panelist how many times per week he visits a convenience store: once, two or three times, or 4+. As our panelist did not shop at convenience stores at all, he was stumped on how to continue.
- An unbelievably broad question asked, "What characters, movies, or brands do you like?"

- A single, straight, male panelist completing a survey on men's clothing was told he was supposed to answer about the clothing he buys for his husband or male significant other.
- A grid question regarding how our panelist felt about certain brands used the following ten-point scale (and yes, this is the actual scale order):
 - 9 – Passion
 - 4 – Indifferent
 - 7 – Love
 - 2 – Dislike/hate
 - 5 – Friend
 - 6 – Friend
 - 1 – Dislike/hate
 - 8 – Love
 - 3 – Indifferent
 - 10 – Passion
- Finally, here is an actual question one panelist received: "Of LCD TV, that you currently own, what type does you mainly watch?"

IRRELEVANT STUDIES

It was amazing how often our panelists who were not the primary grocery shopper for their household – and who had provided that information in their panel profile – were disqualified for studies because they were not the primary grocery shopper for their household. In other words, they were asked to attempt studies for which the panel provider should have easily known the panelist would not qualify.

Similarly, we had cases where panelists who had already provided the ages and genders of their children were asked to complete studies for children of a different age, or who had in their profile that they own no pets and were still offered questionnaires that disqualified them because they own no pets.

As sample is often priced by incidence, this is not just a panelist frustration issue, either. You might be paying higher prices for sample because the panel provider either has inaccurate profile information on file, or because they did not run a well-designed sample selection.

But the topper had to be the breastfeeding survey, which was completed by one of our male panelists. And yes, he qualified for the survey based on his honest answers to the screening questions (a fact which understandably left him quite bewildered).

The topper was the
breastfeeding survey
– completed by one
of our male panelists

TEN SURVEYS IN A ROW...OR MORE

The panel industry has paid a lot of attention to trying to identify panelists who belong to more than one panel, and making sure they aren't sampled multiple times when multiple panels are blended for one study. Yet some panels let their own respondents complete survey after survey non-stop within their own panels.

Which situation should you be more concerned about:

- The chance that out of two panels, each with over a million members, the same respondent might be randomly selected for your survey of 1,000 people.
- The chance that your study might be the 14th one completed by a respondent that day.

Some panels let us complete survey after survey, non-stop

There were some panels that let people participate in study after study, non-stop. Even if a respondent is attempting to be conscientious about her answers, what impact will two hours of answering questionnaires have on her attention span (particularly if those questions are as bad as some of what we experienced)? What impact will it have on your study if she just answered another study on a very similar topic?

WHO IS THE PANELIST?

It was interesting how many times our panelists were asked to have another member of their household complete a questionnaire. Parents were routinely asked to have their children participate in a study; married panelists were often asked to have their spouse complete the study.

Every one of these panels treated our panelists as individuals when signing up, rather than as households. Panelists were not told that their spouse or children would need to participate, although through the profiles, panel providers have information about other household members. The profiling that is done is mostly on the individual level – what the panelist himself watches on television, what his occupation is, whether he wears contact lenses, etc. Generally, little is asked about spouses, children, or other household members.

There is also a major question about who is completing these studies. In at least two different cases, our panelists completed a questionnaire for a child or spouse, feeling that this was perfectly acceptable because “I know how she would answer” or “I’m the one who would be buying that product for him anyway.” The other household member was unavailable or unwilling to participate (never having agreed to be part of the panel to begin with), so the panel member simply completed the questionnaire, in good faith, attempting to be helpful.

We have no way to know how prevalent this practice is, but when you request a sample of men 35 to 54 years old, is the panel company actually sampling their male panelists, or are they asking female panelists to have their spouse or partner complete the study (and possibly giving you lots of women’s opinions about how the man in their life would answer)?

TO ROUTE OR NOT TO ROUTE...

Simply put, if a panelist receives an invitation to a specific questionnaire, the panel company is not using a router. If a panelist is not sent to a specific questionnaire, but is asked a series of qualifying questions and then routed to a questionnaire for which the

panelist qualifies, a router is being used. Some panel companies use routers occasionally rather than full-time (e.g. Panel 5 in our report invites panelists to participate in specific studies, but if a member goes to the panel website, they don't see a list of available studies – they're just invited to "take a survey" and a router is used).

It is not our purpose in this study to attack or defend the use of routers. The primary difference for respondents is being invited to a specific study (with a specific length and incentive amount revealed up front), versus being invited to "take a survey," with an unknown length/incentive until the panelist qualifies for a particular study. As with many other things associated with panels, you as the researcher need to determine whether you are comfortable with (or even prefer) the use of routers, or not.

A WORD IN DEFENSE OF PANEL PROVIDERS

Yes, this report goes to great lengths to point out that there are some very dubious options for panel research out there. And we have been critical of panel providers on a number of fronts. But consider this: Research Now, uSamp, Vision Critical, and all the other panel providers are simply trying to react to market forces. Those market forces are frequently demanding faster turnaround and lower costs – too often at the expense of quality.

It's up to us to refuse to use their flawed solutions

You and I and all the other researchers out there make up those market forces. It is our responsibility as researchers to know about our sample sources, to demand better when necessary, and to stop giving business to those with abusive practices that compromise quality. Panel providers are often doing what they feel they have to in order to survive; sometimes their approaches are defensible from a research standpoint, and sometimes not. It's up to us to determine which is which, reward the panels that are doing it right through giving them future business, and punish the panels that are hurting the industry by refusing to use their flawed solutions.



PANEL 1

Invitations Received in 30 Days per Panel Member: 42.3

Average Frequency: 1.4 invitations every day

Completed Surveys: 20.7

Did Not Qualify: 15.3

Closed: 4 (9.5% of all invitations)

Other: 2.3 (every panelist had at least one survey that could not be completed due to technical problems)

Average Questionnaire Length: 22.1 minutes

Average Incentive: 98 cents

Average Per Hour Incentives: \$2.67 per hour

Average Monthly Pay: \$20.29

The numbers on this panel varied dramatically according to the individual panelist – more so than any other panel – with the number of invitations ranging from a low of 16 to a high of 61.

Panel 1 allowed more than twice as many completed interviews per month – 20.7 – as any other panel in our test. Again, this varied widely from just seven completes for one panelist, all the way to 37 completed questionnaires in one month for another panelist.

“Boy, this site just hits you non-stop”

As one panel member commented, “Boy, this site just hits you non-stop.” On one day, one panelist received seven different invitations from this panel (to go with four the day prior, and three more the day after – a total of 14 invitations over three days). Another panelist had three different days with six or more invitations.

Not only were we completing a lot of questionnaires, but the length of those questionnaires was the highest of all the panels we tested – an average of 22.1 minutes per survey. All this, for the lowest incentives of any tested panel – an average of 98 cents per questionnaire. That works out to \$2.67 per hour (assuming all 60 minutes are consumed by actually completing questionnaires, and no time is spent with closed studies, disqualifications, etc.). This was easily the lowest figure of any panel that offered measurable incentives.

One other questionable practice is that there appeared to be little control over how many questionnaires a respondent could complete at any given time. Panelists can log on to the home page and complete as many questionnaires as there are available for them at that moment. A random check showed as many as 26 questionnaires that could be attempted without pause.

Ironically, researchers worry about respondent fatigue with questionnaires that are overly long. But even if your questionnaire is brief and engaging, what level of respondent fatigue might you be getting from someone who just sat for two hours to blow through nine different questionnaires, then answered yours?

There was one area in which this Panel 1 fared quite well: closed questionnaires. On this panel, under 10% of all surveys were closed when panelists attempted them.

Still, keeping surveys open for a reasonable length of time was the only identifiable redeeming quality of this panel. Long questionnaires, extremely low incentives, numerous technical problems, and a bombardment of invitations all combined to make Panel 1 one of the more questionable options in our test.



PANEL 2

Invitations Received in 30 Days per Panel Member: 10.3

Average Frequency: one invitation every 2.9 days

Completed Surveys: 2

Did Not Qualify: 5.7

Closed: 2 (19.4% of all invitations)

Other: 0.7 (a few technical problems)

Average Questionnaire Length: 20.2 minutes

Average Incentive: \$2.12

Average Per Hour Incentives: \$6.30 per hour

Average Monthly Pay: \$4.24

This panel was an improvement over Panel 1 in many different ways, and was one of the better options we encountered in this test. Panelists had an average of just over ten opportunities to complete surveys in a typical month, which does not seem to be abusive of their time. The closure rate was only 19.4%, which was among the better ones in our study. Technical problems were not particularly an issue. And at an average incentive of \$6.30 per hour, the incentives were the third highest of the 12 panels we tested. Incentives were also clear and easy to redeem. Finally, unlike some of the other panels, our panelists registered not a single complaint or frustration about Panel 2.

We did notice two things. First, the average questionnaire length was a shade over 20 minutes, which was the third-highest figure in this test. (Of course, with higher incentives, it's also possible to request participation in longer questionnaires.) Second, there was considerable variation from one panelist to the next in terms of survey volume, from a high of 17 invitations in a month, to a low of just four. Still, even the high of 17 invitations was fewer than the *average* for five other panels in this test (as well as a few more from our last test), and it would have represented the *lowest* number of invitations received for two of those panels. Seventeen is far lower than the 60 or 61 invitations panelists received from some other panels.

Not only were the statistics from Panel 2 encouraging, but there were none of the abuses or questionable practices that some of the other panels employed. Panelists were not directed to sales efforts under the guise of research. They did not have the opportunity to

sit for hours and take survey after survey. They are actually able to get rewarded for their efforts.

Overall, Panel 2 is one that, at least based on the parameters we were using in this test, we would feel comfortable recommending. As stated previously, there are a lot of other criteria that must be evaluated – pricing, service, recruiting methods, data replicability, etc. But our criteria in this test showed a panel that obviously respects its panelists' time and efforts, and is not abusive of the research studies with which they are entrusted by clients.



PANEL 3

Invitations Received in 30 Days per Panel Member: 20

Average Frequency: one invitation every 1.5 days

Completed Surveys: 1

Did Not Qualify: 13

Closed: 4 (16% of all invitations)

Other: 2 (one of the two highest rates of technical problems in our test)

Average Questionnaire Length: 17.3 minutes

Average Incentive: n/a

Average Per Hour Incentives: n/a

Average Monthly Pay: n/a

Panel 3 was right about in the middle in terms of panelist activity. Our panelists received an average of 20 invitations in a 30-day period, but only managed to complete an average of one survey, due to the high number for which they did not qualify. Closures were quite low, at just 16% of all invitations. Panel 3 also had one of the shorter average questionnaire lengths (just over 17 minutes). Almost all invitations were between 10 and 20 minutes.

Panel 3 was one of three panels for which it was not possible to figure out the actual value of the incentives. Some panels offer actual cash rewards, and others offer points that can be used for merchandise or cash (or rewards with a cash equivalent, such as 150 points equaling a \$15 Amazon.com gift card). This panel offered no rewards on which we could reasonably place an actual cash value, because all of their rewards were either discounts (e.g. \$10 off a \$50 purchase at a certain retailer), or points for other programs (e.g. points to a particular loyalty program).

Although one might question the value of the incentives, little this panel did truly stood apart in either a positive or a negative manner. There were no strong concerns voiced by our panelists, no unethical practices we could identify, and no absurd figures in terms of incentives, closure rates, number of invitations, etc.



PANEL 4

Invitations Received in 30 Days per Panel Member: 9.8

Average Frequency: one invitation every 3.1 days

Completed Surveys: 2.5

Did Not Qualify: 3.5

Closed: 3.3 (33.7% of all invitations)

Other: 0.3 (very few surveys that had technical problems)

Average Questionnaire Length: 17.7 minutes

Average Incentive: \$2.43

Average Per Hour Incentives: \$8.24 per hour

Average Monthly Pay: \$6.08

This panel was a mixture of good and bad. Unfortunately, the bad was *very* bad.

Although this site is clearly promoted to respondents as a *research* panel (not a hybrid such as MyPoints, where members are rewarded for their shopping behavior as well as for answering surveys), there were numerous opportunities for panelists to sign up for coupon deals, compare their car insurance rates, and get estimates on home improvement. Worse, each of these opportunities was clearly promoted to panelists as a “survey.” In fact, there was no way to distinguish the sales efforts from the actual research surveys on their website.

It is highly disappointing to see a panel employ such doubtful ethics.

In telephone research, this practice has long been known as “sugging” (Sales Under the Guise of research), and is considered by most researchers to be unethical. It is also strictly against CASRO guidelines (of which this panel company is a member). It is highly disappointing to see a panel supposedly dedicated to research employ tactics of such doubtful ethics. At least these offers were not e-mailed as invitations to panelists (they were only available on the website, mixed into a list with all of the available studies).

Panel 4 also had the second-highest closure rate in this test, with over a third of all surveys being closed, even though our panelists attempted the studies on this panel an average of 14 hours and 56 minutes after receiving an invitation.

On the positive side, average length was on the shorter side at 17.7 minutes. In addition, this panel offered the most generous incentives in this entire test, at an average of \$2.43 per study. Given the relatively short questionnaire length, this projects to \$8.24 per hour, or 66% higher than the average for all the other panels.

The mix of good and bad could also be seen in the number of survey opportunities for panelists. Panel 4 was quite reasonable in the number of survey opportunities that were actually e-mailed to respondents – an average of fewer than ten for the month. Our panelists managed to complete an average of only 2.5 surveys during this time.

However, the panel has a “back door” for members who want to complete more: once panelists log on to the site, they are offered as many as 50 or 60 different survey opportunities (and sales opportunities), with apparently no limit to how many they can complete in one sitting.

Panel 1 did this too, but there was a key difference. On Panel 1, the only questionnaires available to members were those for which they had already received (or were about to receive) an actual invitation. Panel 4 offered many additional opportunities for which no invitation had been sent. So Panel 4 is less intrusive to members, not filling their inbox with invitation after invitation. But Panel 4 offers even more opportunities for members to complete questionnaires non-stop. While Panel 1 usually had 10 to 20 opportunities available at any one time, Panel 4 had anywhere from 30 to 60. One random check showed 39 opportunities, totaling over seven hours of survey time, that could be completed non-stop (assuming no more were added while all of those were being completed).

Once again, your own project may be of very reasonable length and engaging design – but if your survey is the seventh one respondents have completed today, along with viewing some sales pitches under the guise of “research,” how much attention do you think they’ll pay to your study?



PANEL 5

Invitations Received in 30 Days per Panel Member: 51.3

Average Frequency: 1.71 invitations every day

Completed Surveys: 10

Did Not Qualify: 23.7

Closed: 14 (27.3% of all invitations)

Other: 3.7 (numerous technical problems)

Average Questionnaire Length: 17.5 minutes

Average Incentive: \$1.75

Average Per Hour Incentives: \$6.00 per hour

Average Monthly Pay: \$17.50

Like Panel 4, this panel was a real mixture of good and bad.

A primary concern about Panel 5 was a very, very high number of opportunities to complete surveys – 51.3, on average, although we had panelists who got as many as 61 in a month. The average panelist received multiple invitations daily, and there were times in which panelists received up to eight invitations in a single day. In fact, more opportunities were available through Panel 5 than through any other panel in our test. Consider one panelist’s records from a two-day period:

- Day 1: Invitations received at 1:24 am, 3:16 pm, 6:08 pm, 7:59 pm, 8:40 pm, 8:43 pm, 8:57 pm, and 9:24 pm (eight in total, including five received in less than 90 minutes)
- Day 2: Invitations received at 8:24 am, 9:05 am, 12:02 pm, 12:32 pm, 5:51 pm, 6:15 pm, and 6:57 pm (seven in total, or 15 over two days)

Fifteen invitations in two days? Seven of the 12 tested panels didn't *average* 15 survey invitations for a month.

Fifteen invitations in two days?

Interestingly, due to the high number of surveys for which our panelists did not qualify, they only completed an average of ten questionnaires during the 30 days, even with all these opportunities. But one thing we did note was a very high number of problems. For instance, two of our panelists received the same invitation over and over and over again (around 12 times for one panelist) – not as a reminder, but each time presented as a new opportunity. (Given the fact that this was an obvious technical glitch, we did not even count these duplicate invitations in our totals.)

Panelists were also commonly given odd messages, such as responding to an invitation, then being told they “were not a match” for the survey without so much as one question being asked. Numerous times, panelists were told they had already completed a particular study, even though we checked every invitation and the project number and description were entirely unique. A couple of times, panelists were able to complete the same questionnaire off of two different invitations.

One other practice of this panel that may concern some researchers is the insertion of screening questions for other studies before the “main study” is run. Each time a panelist responds to an invitation, before the questionnaire come four or five seemingly random, unrelated questions that are being used to screen respondents in advance for other low-incidence studies. (This was not a router, as invitations were sent for specific surveys.) Your respondents might be asked what brand of cigarettes they smoke, whether they have diabetes, and whether they have purchased any house paint in the past month immediately prior to attempting your study.

In many cases, this is probably not a problem, and the questions can appear to respondents just like screening questions used in routers. However, as with routers, the client has no control over the content of these questions, and must rely on the panel company to insert only questions that will not bias the client’s study. For instance, being asked about house paint purchases may not be a problem immediately before a questionnaire for Starbucks or Allstate, but it certainly could be a problem right before a questionnaire for Home Depot or Lowe’s.

The panel does not have a list of all available questionnaires on their website, but at the end of each questionnaire, panelists are asked whether they would like to take another survey. Without limits, this can again lead to survey after survey being completed, non-stop (of course, with the intense number of invitations this panel sends out, this can

happen even if respondents are not asked at the end of each questionnaire whether they'd like to keep going with another study).

In other areas, this panel was not particularly problematic. It was right in the middle in terms of the percentage of closed surveys. The proportion of technical glitches (other than problems with the invitations, such as the duplicates) was also typical. Average questionnaire length was one of the lower figures in this study, and average incentives offered were pretty solid (at the equivalent of \$6.00 per hour, it was number four in our test).



PANEL 6

Invitations Received in 30 Days per Panel Member: 11.3

Average Frequency: one invitation every 2.7 days

Completed Surveys: 6.0

Did Not Qualify: 5.3

Closed: 0 (0% of all invitations)

Other: 0

Average Questionnaire Length: 16.1 minutes

Average Incentive: 95 cents, plus a variety of sweepstakes

Average Per Hour Incentives: \$3.54 per hour

Average Monthly Pay: \$5.70

This panel was one of the least demanding of panelists' time. The average panelist received only 11.3 invitations during the month, which was on the low end of this test. The average of six completed interviews in a month, or about one every five days, also seems reasonable.

This panel was one of the least demanding of panelists' time

Not only that, but this panel was one of just four that had no technical problems at all, and one of only three that had no closed studies at all during the time our panelists were involved. This eliminates a significant source of panelist frustration.

In addition, the average questionnaire length of 16.1 minutes was the third lowest in this test.

Finally, this panel demonstrated none of the major issues that some others did in this test – no sales efforts disguised as surveys, no advertising on the web page, clear directions for redeeming rewards, etc.

The only concern of any type about this panel was that it was second from the bottom in terms of incentives – the equivalent of just \$3.54 per hour (assuming all time was spent

on actual completed interviews). Only Panel 1 was more parsimonious toward respondents on a per-hour basis.

Of course, with a respondent experience that is substantially better than many of the other panels in this test, it's possible that this panel can get away with offering less to respondents and still maintain viable participation rates.



PANEL 7

Invitations Received in 30 Days per Panel Member: 6.5

Average Frequency: one invitation every 4.6 days

Completed Surveys: 6.5

Did Not Qualify: 0

Closed: 0 (0% of all invitations)

Other: 0

Average Closed Time: n/a

Average Questionnaire Length: 10.7 minutes

Average Incentive: n/a

Average Per Hour Incentives: n/a

Average Monthly Pay: n/a

This panel was pretty unique. First, it had by far the lowest number of invitations of any of the panel options – an average of just 6.5 per month. That's one opportunity every 4.6 days. This is 70% lower than the average of 21.8 invitations per month that came from the other panels, and 87% lower than the average of 51.3 invitations that arrived from our most active panel (Panel 5).

Second, there were no studies for which panelists did not qualify. Third, this was one of just three panels which had no closed studies during our test, and one of only four panels that presented no technical problems at all to our panelists.

In addition, the average length of the questionnaires on Panel 7 was just 10.6 minutes, which was the second lowest average in our test (and one of only two panels that averaged less than 16 minutes).

Finally, this was the only panel that offered no tangible incentive for any study – incentives were exclusively in the form of sweepstakes.

Very different indeed, but apparently this panel provider has found a way to make this approach work within an environment where panels are frequently sending invitation after invitation to lengthy studies for a dollar or two each.



PANEL 8

Invitations Received in 30 Days per Panel Member: 34

Average Frequency: 1.1 invitations every day

Completed Surveys: 7.7

Did Not Qualify: 10.7

Closed: 14.3 (42.1% of all invitations)

Other: 1.3 (for the volume of invitations, there were few technical problems)

Average Questionnaire Length: 21.2 minutes

Average Incentive: \$1.64

Average Per Hour Incentives: \$4.64 per hour

Average Monthly Pay: \$12.63

Although not at the very top of the list, Panel 8 was among the more active panels, with an average of more than one invitation per day.

This panel also had an extraordinarily high closure rate. Although our panelists answered these invitations an average of 18 hours, 19 minutes after receipt, a full 42% of the surveys were closed by the time they were attempted.

Imagine that – more than four out of every ten studies closed before even 24 hours went by. What's even more astonishing is that at least 26% of the closed studies closed *in under eight hours* (it could easily be more than 26%, but if a panelist attempted a study 14 hours after receipt, we had no way of knowing exactly when that study closed).

This panel was a bit
of a nightmare for
our panelists

It can be argued that field dates are at the whim of the client, rather than the panel, but it's noteworthy that while some panels had not a single closed study, this one had a ton – proportionately far more than any other panel (25% more than the second-highest panel on this measure; 133% more than the average for the other panels). That suggests either it's not just the client insisting on early study closures, or that this panel is willing to acquiesce to questionable client demands far more than other panels are (or possibly both issues are at play here).

Willingness to go along with whatever the client wants may be what's really happening with this panel, based on a couple of other pieces of evidence. First, the questionnaire lengths on this panel were the highest in our test – one of only three panels to average more than 20 minutes per questionnaire. Second, although we did not specifically track the lengths of the screeners, this panel got a lot of complaints from our panelists about extremely lengthy screeners:

- “After ten minutes it said I didn’t qualify. Seemed like an awfully long time at that point.”
- “I answered about 20 questions before they told me it was closed – obviously I didn’t qualify.”

- “Told me it was closed, but after five minutes of answering questions regarding what I think is important when shopping for various things.”
- “Said it was closed, but I got through answering a lot of questions and it showed me a commercial before it told me it was closed.”
- “After 20 minutes of completing questions, was told I don’t qualify. I answered at least 45 questions prior to that point, and several were (grids). What a headache.”

There were also numerous complaints (as noted above, but there were many others) that this panel was often less than clear (or maybe less than truthful) about what was going on. Respondents don’t answer 20 questions and watch a commercial and *then* find out the study is closed – that’s obviously a disqualification for some reason. Other times, panelists were told they didn’t qualify without answering even one question:

- “Oddly, it just asked my name and address and then said I didn’t qualify.”
- “I clicked ‘start survey’ and it went right to a screen that said, ‘Thank you for your opinions.’”
- “The survey asked my name, income, and what brands I’m aware of, then took me to the finished screen.” (On a questionnaire advertised as ten minutes in length)
- “Clicked ‘start survey’ and went to a page that said, ‘Sorry, you don’t qualify, please hit the button below to return to the main site.’”

In general, this panel was a bit of a nightmare for our panelists. Long questionnaires, numerous opportunities, relatively low incentives (fourth lowest measurable hourly rate in this test), disqualifications after lengthy screeners, far too many closed studies – while our panelists willingly stayed on as members of some of the panels once the test was completed, they abandoned this one as soon as they could.



PANEL 9

Invitations Received in 30 Days per Panel Member: 8.5

Average Frequency: one invitation every 3.5 days

Completed Surveys: 5

Did Not Qualify: 3.5

Closed: 0 (0% of all invitations)

Other: 0

Average Questionnaire Length: 18.3 minutes

Average Incentive: \$2.22

Average Per Hour Incentives: \$7.28 per hour

Average Monthly Pay: \$11.10

Just in terms of the pure usage statistics, this panel was quite good – an average of only 8.5 opportunities in a month for our panelists. In addition, there was not a single closed survey, even though our panelists sometimes took as long as 49, 58, and even the full 72 hours from invitation to attempt. This was also one of only four panels not to have a single technical problem with a survey during our test.

Finally, the average hourly incentive was \$7.28, which was the second highest of our panels. And incentives were highly predictable, being based exactly on questionnaire length and never varying from their standard.

The ideal panel, right? Maybe, maybe not. The site itself causes significant concerns.

One real issue is that there does not appear to be any way for respondents actually to cash in on their rewards. The FAQ section of the site provides instructions for how panelists can redeem their rewards – but the page it instructs people to go to does not exist. At the various online panel sites where consumers provide feedback on their panel experiences (such as www.surveypolice.com), this was a common complaint – no way to redeem rewards on this panel. When our panelists sent e-mails to the panel provider for help with this, they received no response at all.

There does not appear to be any way for respondents to cash in on their rewards

The site itself is also filled with advertising by outside companies. Imagine if you're a researcher for Nissan and your respondents are seeing banner ads for Ford when they visit this site.

This was also the only site not to have any way for panelists to access surveys through the site itself. If you want to take a survey through Panel 9, you wait for an e-mail invitation – period. And although this is certainly a judgment rather than a statement based on the statistics of our test, the website itself was not exactly the most functional or professional of the lot. While all the other panels at least appeared to be highly professional, this one was filled with bad clip art and looked like it had been put together by a not-particularly-talented fifth grade class. Yet member panelists were regularly contacted by a major panel broker, so this isn't just some fly-by-night scam operation.

The profiling on this panel was severely limited. While other panels profile respondents extensively, this one recorded a few very basic demographics and never offered members an opportunity to update or add to their profiles. Apparently if you register as having one child, you'll forever be listed as a one-child household, even if you give birth to quintuplets two months later.

Even our panelist experiences were inconsistent. One panelist signed up and had to wait weeks for his first invitations to arrive, even though a welcome message was sent right away. Another panelist got the welcome message, but never received a single survey invitation, and again there was no response to his e-mails to the panel provider about the situation.

The lack of professionalism, the absence of solid profiling, the distinct lack of forthright information on redeeming rewards, the lack of response to panelist inquiries, and the consumer complaints about the inability to get their rewards all raise serious red flags about this panel, even though the statistics related to this panel look quite good.



PANEL 10

Invitations Received in 30 Days per Panel Member: 7.7

Average Frequency: one invitation every 3.9 days

Completed Surveys: 5

Did Not Qualify: 1

Closed: 1.7 (22.1% of all invitations)

Other: 0 (no technical problems)

Average Questionnaire Length: 9.6 minutes

Average Incentive: 84 cents

Average Per Hour Incentives: \$5.25 per hour

Average Monthly Pay: \$4.20

This panel was among the leaders in not bombarding our panelists with invitations. It was also among the most consistent from one panelist to the next, with little variation in how many opportunities each panelist received. Further, panelists cannot go to the panel website and participate in additional surveys – what they’re actually invited to is what they can complete. And closures were not a severe problem – just over 22% were closed by the time our panelists attempted them. Although it’s still troubling to see this many projects close this quickly, this figure was about average for the panels in our test.

This panel was among
the leaders at not
bombarding our panelists

This was also the panel with the shortest average survey length. In fact, few others even came close. While some panels averaged over 20 minutes for their studies, this one averaged less than ten. Therefore, even though the average incentive was only 84 cents per study, the per-hour incentive of \$5.25 was not bad. (This figure included a number of studies of 13 minutes or less for which there was no cash incentive – only a sweepstakes.)

Finally, this panel was one of the few not to have any technical issues that prevented our panelists from completing a study. With fewer invitations, there is less opportunity for technical problems to occur, but even on some of the other panels with relatively few invitations, there were at least one or two technical failures.



PANEL 11

Invitations Received in 30 Days per Panel Member: 23

Average Frequency: one invitation every 1.3 days

Completed Surveys: 2.7

Did Not Qualify: 11.3

Closed: 6.7 (29.1% of all invitations)

Other: 2.3 (one of the two highest rates of technical problems in our test)

Average Questionnaire Length: 19.6 minutes

Average Incentive: \$1.27

Average Per Hour Incentives: \$3.89 per hour

Average Monthly Pay: \$3.43

“Not as bad as some others” seems to be the best way to describe Panel 11. With 23 invitations in 30 days, it was fourth highest in volume. The average questionnaire length of 19.6 minutes was also fourth highest in our test. The closed rate of 29.1% was the third highest.

“Not as bad as
some others” is
the best description

Fortunately, this panel showed none of the practices that cause significant concerns with some of the other subjects in this test: no opportunities for panelists to complete survey after survey day after day, no sales pitches dressed up as “research,” no pre-screening questions inserted before the client’s study begins. Overall, this was a fairly solid option for research (at least on the basis of the criteria we used for this test).

Two things we did note about Panel 11. First, along with Panel 3 it had the highest rate of technical problems in our study – one out of every ten attempts could not be completed because the questionnaire froze, the content wouldn’t load, or we received some type of error message. Second, the incentives were among the lowest in this test – at an average of \$3.89 per hour, only Panels 1 and 6 paid members less for their efforts.



PANEL 12

Panel 12 shows none of the statistics such as percent closed or average incentive, because it was not realistic to measure any of these, given this panel’s unique approach.

Members of this panel do not get repeated e-mail invitations. In fact, they get no specific invitations at all – only the occasional reminder (about every week or so) that there are new survey opportunities available. Panelists don’t get to choose what surveys they attempt based on length or topic, as they can with so many other panel companies. Once they log in to the website, they go through a variety of screening questions until they are told they qualify for a specific study (and then are given information about the incentive

amount and the questionnaire length), or they are told they don't qualify for anything at the moment – classic use of a router.

Most interestingly, once a panelist completes a questionnaire, the site actually blocks that panelist from attempting any further questionnaires for about a week. If they don't qualify, they can return the following day for another attempt. So even if panelists want to go to the website for Panel 12 and complete as many questionnaires as they can, they simply do not have that option.

The site actually blocks panelists from any further attempts for about a week

This means all of the metrics we used to evaluate the other panels just don't apply here. Panelists are never told that a study is closed, because they never learn about specific study opportunities. They don't get their inboxes filled with survey invitations, since there are no invitations to specific surveys. And the exact number of completed surveys each panelist is allowed in a month will depend on how many they qualify for, which is beyond the control of the panel company. It appears that the most any panelist could do in one month is four completed surveys, assuming they log in every week and qualify for a study on each attempt.

Even the incentive amounts and questionnaire lengths are difficult to measure accurately, since this information was only revealed once a panelist had qualified for a particular study (and it's not fair to compare one panel's information based on what our specific panelists qualified for, versus all the others where those numbers are based on all the invitations). The only thing we can say is that the incentives seemed fairly typical and the lengths did not appear to be outrageous – panelists weren't being asked to complete a 40-minute study for a dollar or a sweepstakes entry.



WHAT YOU CAN DO

Some researchers criticize online panel research as a whole because of the bad practices we have detailed in this report. But there are also bad focus group facilities, bad statistical analysts, and bad telephone interviewers, among other things. A bad questionnaire would be a bad questionnaire, regardless of how it is administered.

Whether you're the researcher or the end user of the research, it is ultimately up to *you* to avoid these bad practices. So what can you do?

First of all, establish clear parameters for what you value in a panel. Do you care about the incentives panelists earn? If so, that needs to be part of your selection criteria. Do you care about whether the panel uses a router? If so, make sure you know whether they will be doing that.

It is up to *you* to avoid bad practices and establish what you value in a panel

And if you don't care about these things, why not? Do you have well-considered, strategic reasons why you don't consider some of these criteria as important?

Second, evaluate panels based on more than their pricing and sales pitches. This report and our original one are a place to start. Look for other research-on-research, such as Mktg. Inc.'s Grand Mean Project, which deals with data replicability and consistency within panels. Poke around panel websites and see what the experiences are like. Talk with other researchers. Check out websites such as www.surveypolice.com, where panel members talk about their experiences and comment on different panels. Maybe you even want to be a panelist for a month or so, to find out what the experience is really like.

Third, make sure you communicate with your researcher or panel provider and *you know what's going on with your study*. Grey Matter Research communicates clear expectations to panel providers, such as:

- The provider is *not* allowed to subcontract to other panels for sample – if we acquire sample from one panel, we expect sample from *that* panel and no others.
- We control the field time, not the panel company. We often keep the study open longer than the panel provider suggests, to achieve a higher response rate and a lower likelihood of a sample biased due to quick closure.
- No questions other than the ones we submit are to be asked (no insertion of screening questions prior to our studies).
- We request and regularly evaluate not just data from the completed interviews, but also from those which did not qualify for the study. We want to make sure the attempts are balanced – not just the completes.
- We carefully test and evaluate the questionnaire programming, rather than leaving it up to the panel company to make sure the programming is correct and accurately reflects our programming instructions.

- We work closely with the panel company to identify and eliminate any questionable respondents – people who regularly straightline, complete a 15-minute questionnaire in six minutes, etc.

In other words, we do what we can to control the quality of the field experience, rather than just handing the questionnaire to the panel provider and waiting for the data file to arrive.

Fourth, be willing to pay a bit more for quality. You're not going to stay in the Hilton for the price of a Motel 6. It's unrealistic to make substantial demands of panel providers and then choose a panel based on the low bid. Obviously costs are important in research, but doing things right takes time and money. If you're not willing or able to accept that, then be willing to accept whatever you get from the cut-rate provider.

Finally, take nothing for granted. Rather, *be involved* in the field, or work with a vendor who is involved. Fieldwork is not the most exciting thing in the world, but it is critical for the quality of your data. Too often, the field process is a black hole, with researchers caring primarily about getting the end data so they can analyze it. But if the data collection methods are flawed, resulting in questionable data, what good is strong analysis?

Once you know what you want out of a panel, you can identify the panels that provide that, and actively manage the experience (or work with a research vendor that does) to make sure that's exactly what you receive.



ABOUT GREY MATTER RESEARCH

Grey Matter Research & Consulting has been operating since 1996, for many years under the name Ellison Research. Although the name has changed, the grey matter behind the company remains the same as when it opened.

Our clients are highly diverse and our work is very broad-based, with experience in retail, financial services, non-profit, communication, automotive, health services, and other sectors. We assist clients through both qualitative and quantitative research services.

We have also conducted numerous studies at our own expense to understand the American consumer mindset more thoroughly (including this one).

CLIENTS WE HAVE SERVED INCLUDE:

- ◆ Coca-Cola
- ◆ General Motors
- ◆ American Red Cross
- ◆ PetSmart
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- ◆ Macy's Department Stores
- ◆ Electronic Retailing Association
- ◆ BMW
- ◆ Fairmont Hotels & Resorts
- ◆ The Alzheimer's Association
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- ◆ LifeWay Christian Stores
- ◆ Navistar
- ◆ Chrysler Corporation
- ◆ The Hallmark Channel
- ◆ Herman Miller
- ◆ Caremark
- ◆ Suzuki
- ◆ World Vision
- ◆ Mazda Motors
- ◆ Dove Chocolates

Results from these studies have been covered in the international media, such as *USA Today*, *The Financial Times of London*, Associated Press, MSNBC, *Los Angeles Times*, USA Radio Network, *Dallas Morning News*, *Harvard Business Review*, *Wall Street Journal*, and many other outlets in the USA, China, England, Canada, Russia, New Zealand, Norway, Korea, Sweden, Hungary, the Philippines, Australia, and other parts of the world.

Our work has even been quoted in Jay Leno's opening monologue on *The Tonight Show*, and used in U.S. Senate panel hearings.

Grey Matter Research is available to serve clients through privately commissioned research studies such as brand awareness and definition, customer satisfaction, concept and product testing, positioning, and customer loyalty.

More information on Grey Matter Research is available on our website: www.greymatterresearch.com.

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