



Best Practices in Sample Management

Key learnings from the Illuminas - Toluna Multi Channel Sampling study

Introduction to the Research

How Well Do You Know Your Online Panel?

With online panels steadily increasing in popularity and consequently becoming the go-to source for consumer and business-to-business research sample, managing a panel diligently has never been more important and necessary. While most panel vendors have measures in place to help ensure the quality of their panels, their main role is to serve as a source for research respondents, not to ensure the accuracy and actionability of your research results. Ultimately, only you and your research partner can do that.

When you engage with a panel vendor, you need to know where the respondents came from, how they were recruited and how they were assigned to the panel. Each of these variables can have an impact on the outcome of your project, so understanding and managing them accordingly will help to mitigate risks and ensure the overall quality of your research.

Partnering with a well-versed research company who understands the in's and out's of panel sampling can help ensure the accuracy and efficacy of your panel-based research study, because we understand the importance of sample management in reducing risk and ensuring our clients' success. Illuminas is constantly exploring and analyzing new methods for panel research and is a proven leader in testing new sampling capabilities set forth by the research industry.

In an effort to increase our knowledge of sample management and add to our library of research best practices, we recently partnered with sample giant Toluna / Greenfield Online to take a closer look at the various types of panel sample they offer. We have been long-term partners with Toluna, but to date hadn't taken full advantage of all of their sample channels. Undertaking this investigative research was a perfect opportunity to broaden our understanding of the evolving landscape of panel research and to inform decisions about whether to start utilizing some of the industry's latest offerings in sample channels.

Illuminas takes their research extremely serious; it's their job and they want to fully ensure their clients' results are 100% valid. Illuminas was proactive in conducting research to understand the impact of new respondent communications methods, and sampling channels. It shows just how dedicated they are to their clients' research results.

- Toluna

Introduction to the Research, cont'd.

The Illuminas - Toluna Multi-Channel Sampling Study is a detailed look into how Toluna's use of multiple channels to recruit individuals for survey participation impacts research results. Through this joint research effort, we learned that various sample channels do have the potential to introduce differences in the results they produce and to the analysis and interpretation of data. However, we also discovered that we can address these differences – once understood and acknowledged – through effective process oversight and quota management. This study has changed our perspective towards alternate sample channels, broadened our sample options, and gave us the insight needed to develop best practices for successfully using those sample channels in the future.



Toluna plc is a leading global online market research panel and survey technology company. Toluna offers market researchers access to the world's most highly profiled, responsive and rigorously maintained online panel for sample only and full service projects.

With an online research panel of 4 million active members covering 34 countries, Toluna has won the support of over 1,500 of the world's leading market research agencies.

Study Objectives

There is an array of online respondent recruiting and sample channels available to researchers (see page 4 for details on each), and Illuminas sought to understand whether or not the differences between sample channels could have any impact upon the quality and accuracy of research results and to what degree. To this end, Illuminas and Toluna embarked upon their joint study to test the efficacy of Toluna's multi-channel sampling process.

The study addressed questions in the following areas:

- **Profiles:** Do the channels reach the same audience?
- **Topical findings:** Do the channels provide comparable results?
- **Analysis and decisions:** Do the channels generate comparable insight?

Methodology

Illuminas/Toluna's approach to this research was to first pick a topic – Social Media – that represents a fast-developing subject with a distinct technology bias, posing a challenge for sample channels to provide consistent results based on technology-oriented participation. Additionally, we selected Social Media because it is broadly understood and topical, yet polarizing enough to draw out differences in adoption and usage.

We also set out to evaluate the sample channels in the context of a “typical” research project:

- Multi-country (English-only to avoid language differences)
- Modest timeline to accommodate rigorous scheduling
- Active sample management to meet quota and scheduling objectives

Illuminas/Toluna then embarked upon a 15-minute web-based survey, drawing upon Toluna's multiple sample channels for survey respondents¹.

Definitions of Sample Channels

Multi-Channel Sampling

The four different Toluna sample channels we analyzed in the research are described below:



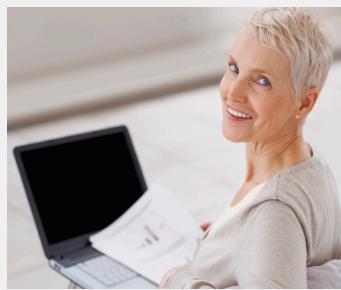
Direct Invite:

An invitation sent via email to a panelist that contains a call to action with survey details. A panelist clicks on the survey link in the email and complete the survey online. How does it happen? A sampling specialist looks at the requirements for the project and query the panel to find the sample frame that will be invited to the survey. Response rate, incidence, sample disposition, and profiling targets are among the variables that are considered when selecting respondents to invite to the survey.



My Survey Center:

An area of the Toluna web site that provides registered panelists easy access to an opportunity to participate in a survey at their convenience. When a panelist logs into the web site they are given an opportunity to go to their My Survey Center Page, which randomly assigns him/her to an open survey where this is an approved sample channel. They are assigned based on profiling information they provide to the panel. You must be a registered panelist to participate in a My Survey Center survey.



Panel Router:

A sample channel in which a respondent is automatically routed to another survey based on similar or matching demographics if the survey they were originally invited to is closed, they did not qualify or the quota they were sampled for is filled.



Real-Time Sampling (RTS):

A sample channel built by inviting and assigning a respondent to a survey sample in real-time. This non-panel approach increases the pool of people who will participate in an online survey by not requiring them to make the commitment to join a panel. Toluna works with hundreds of partner websites who provide the call to action with an approved survey solicitation. An RTS user is required to fill in their basic demographic information. Based on this information, the user is randomly assigned to an approved RTS survey.

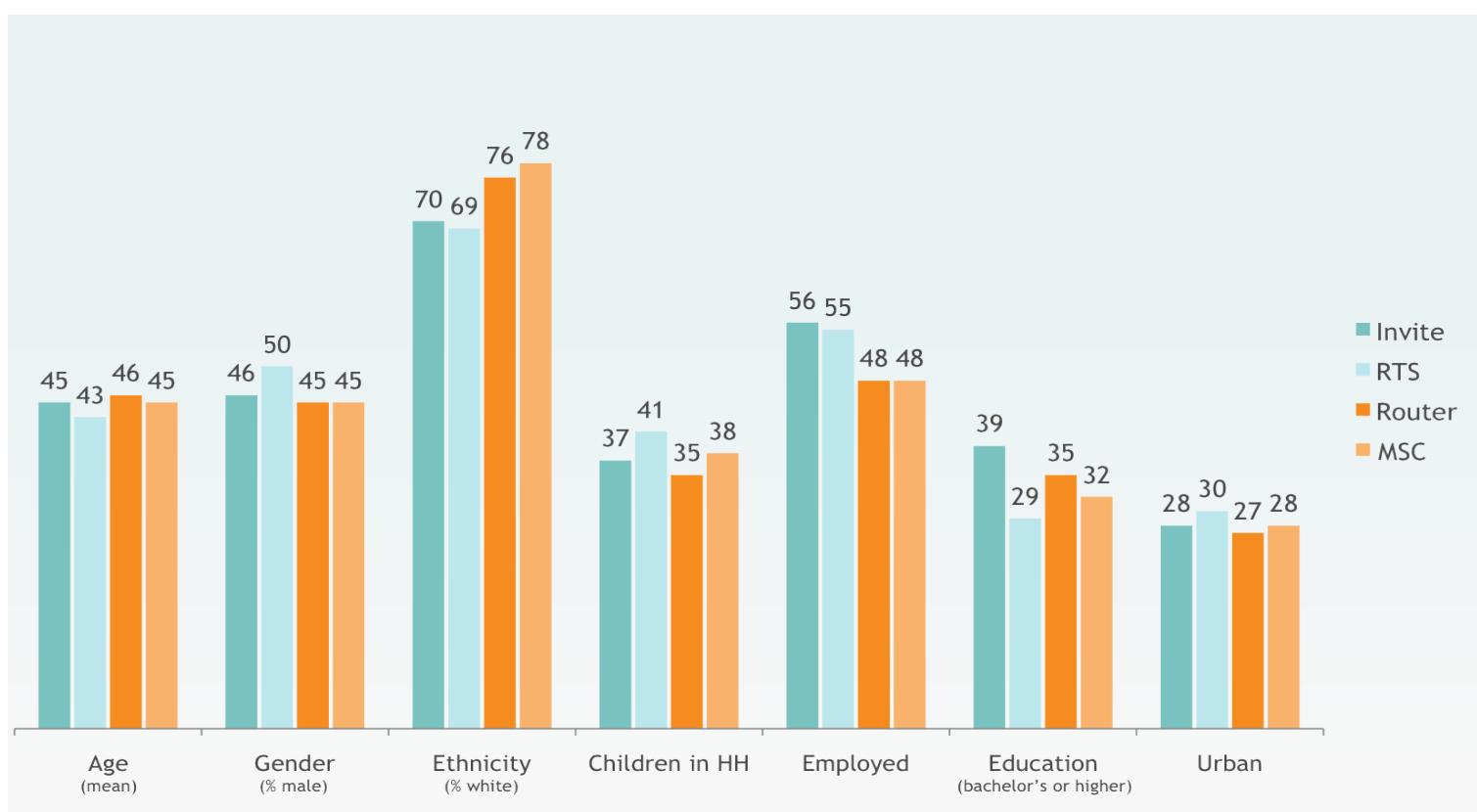
Results of the Research

Overview

The study helped validate our original assumptions on multi-channel sampling leading into the project: introducing new variables into sampling will cause differences to emerge. Because of the evaluation of the sample channels, we now have even more insight into how to obtain the highest quality results by correctly and effectively managing the panel's intricacies.

Do the Sample Channels Reach the Same Audience?

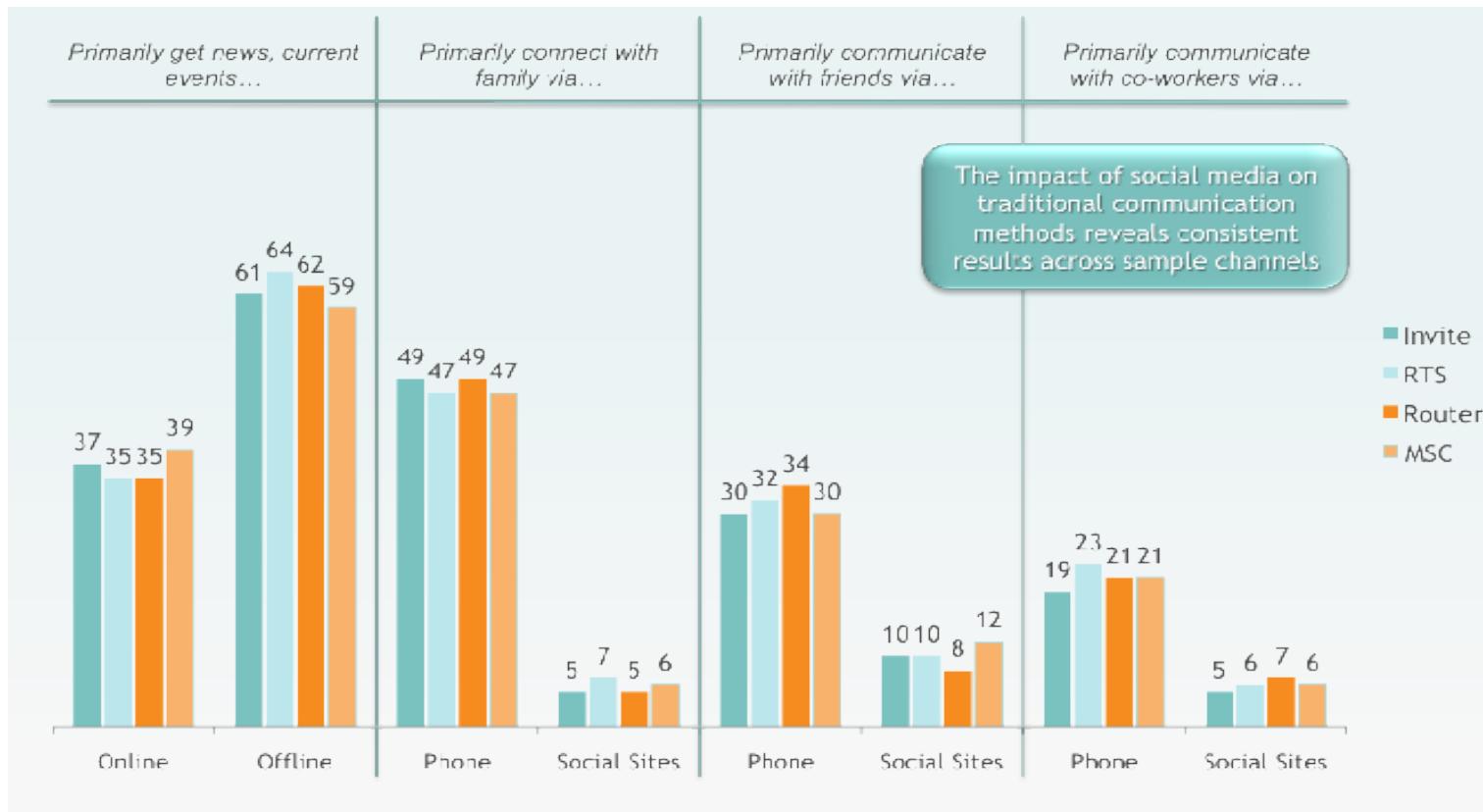
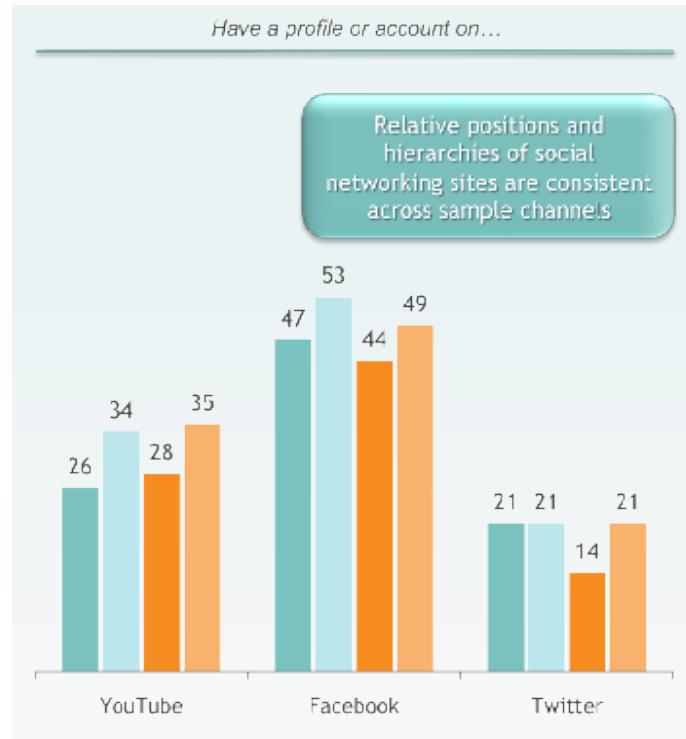
Not exactly. Each sample channel inherently favors different audiences. Interviews obtained using direct invitations tended to skew toward a more educated and ethnically diverse audience while interviews obtained using real-time sampling tended to skew toward family households with a younger, more engaged audience. My Survey Center also tended to skew toward a somewhat more engaged audience.



Results of the Research

Do the Sample Channels Provide Comparable Results and Insight?

Yes, results are comparable across sample channels and the analysis of the results across sample channels is almost identical. This is due in large part to careful field management, which yielded similar convergence of outcomes.



Results of the Research

Do the Sample Channels Yield Similar Data Quality?

Yes, the different sample channels yielded similar quality levels when put through Illuminas' extensive data review.

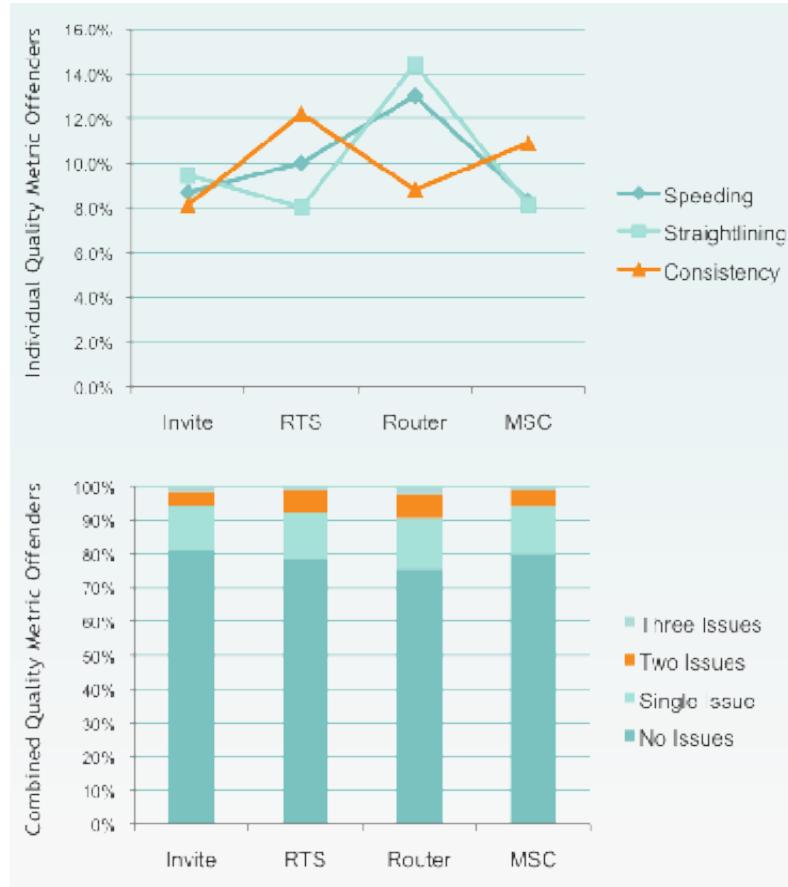
While Toluna leverages the latest technologies to ensure the quality of their data, each Illuminas study is rigorously reviewed for response quality. A prior meta-analysis of eight Illuminas studies and over 10,000 respondents identified three quality metrics with consistent and significant impacts on data quality:

- Speeding (time to completion)
- Straightlining (repetition)
- Consistency (quality)

The poorest performers from each metric above are identified through extensive analysis of the data. Individual quality issues are generally considered acceptable and respondents with a single offense are typically left in the dataset. However, respondents with multiple overlapping issues are investigated further and often removed from the dataset.

The incidence of multiple quality issues is equivalent across each of Toluna's sample channels:

- Router is somewhat above the others, but not significant
- Overall levels are in line with what we observe in other research
- We would consider removing between 1-4% of respondents from any given sample channel



Best Practices Developed

Applying Learnings to Future Research

Listed below are some of our tested and validated best practices for obtaining a general population (Gen Pop) consumer audience through the use of multiple sample channels. With all panel-based studies it is important to follow best practices to ensure the quality of your results. Conducting panel-based research without employing sampling best practices can severely harm the efficacy and actionability of your research.

To successfully use multiple sample channels, we recommend a minimum of 10 days in field to allow for:

- The inherent differences in each sample channel to converge
- Greater granularity and adjustment of quotas or sample distributions throughout fielding

Best Practices for Managing Multiple Sample Channels

1. Treat sample channels as independent sampling units
 - Establish separate quotas and completion targets within each sample channel
2. Set daily targets for the number of interviews collected
 - Both for total interviews by channel and by quotas
3. Anticipate variable completion rates
 - Direct invite (panel) and Router channels have completion timeframes that are driven by the incidence of your audience
 - Real-Time Sampling tends to complete very quickly and should be managed closely to avoid response overload and corresponding biases
 - My Survey Center tends to lag in completion time and progress slowly throughout data collection
4. Leverage differences in sample channels where necessary when:
 - Targeting specific audience types
 - Accommodating strict timelines

Enlighten. Empower.

Illuminas is a full-service, global research consultancy that helps companies leverage market intelligence to gain leadership positions in their industry. Our research solutions are based on the premise that you must accurately diagnose the business issues, effectively predict potential business impacts, and deliver actionable intelligence and not just data. We understand that creating sustainable economic value depends on your company's ability to consistently outsmart the competition.

We work with some of the biggest & most successful companies in technology, media and online. Corporate and product brand managers come to us because we are brand experts who deeply understand their research needs.

Contact us today to learn how we can help you inform your toughest business decisions.

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