

# SSI POV: Online

## Balanced Starts

- A balanced start methodology is useful when the goal is to understand the demographic profile of a certain group within the overall population.
- Balancing the sample on those people who start the survey allows use of the population of people who completed the survey screener to identify a true incidence and profile.
- This method can be complex to manage in field and it is important to understand its limitations.

In a balanced start methodology, a survey is balanced to the population of interest at the point of starting the survey (the first survey page).

### When Is Balanced Start Methodology Useful?

This methodology is useful when the objective is to understand how many people use a product and the demographic profile of that group. Anyone can produce the “net N” number of interviews with users and profile them. However, we cannot be sure that we have found the true incidence and the true profile.

Imagine that the screener part of the survey was in fact part of the entire survey. If you now profile everyone who took the screener you can tell if the entire sample is representative. If it is, then you can be reasonably sure that the incidence is correctly stated and the profile of the completes is correct. Balancing the sample on those people who start the survey effectively allows you to use the population of people who completed the screener to identify a true incidence and profile.

### Managing the Drop-Out Issue

Normally we assume there will be a certain number of drop-outs (that is, people who start but do not continue to the termination point of a survey) and we over sample to allow for this. We also assume that drop-outs occur at random and therefore, have no real impact on the data itself. If the drop-outs are not random, however, then we have bias that may show in the data. The profile of participants who drop out should always be examined to see if they are random.

The distribution of drop-out points through the questionnaire should also be examined, ideally during a soft launch, so that high drop-out points can be adjusted to reduce the rate.

Drop-outs also should be considered during the screening process itself. These people are potentially problematic as we do not know if they are going to pass the screener. While this can have a big impact on the calculation of incidence, the impact can be mitigated to some extent by placing the “start” counters at the end of the screener. Thus, everyone who gets through the screener section (pass or fail) is deemed to be a starter and is part of the sample that is balanced to the population.

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Again this only works if drop-outs occur randomly. If drop-outs occur as a consequence of something that is being measured, then the measurement will be flawed.

## Balancing One Item Only

If balanced starts are required, quota controls on completes cannot be applied. The reverse is also true: if quotas on completes are required then balancing on starts will not be possible.

## Knowing Your Incidence

If we are balancing starts with the goal of achieving 100 completes at 10% incidence, then we know that our quota cells will be based on 1000 starts. But what happens if we find out in the field that the incidence is actually 20%? This would mean that we only need 500 starts. Some completed screeners would need to be “thrown away” as they are now over quota, as would some of the completes associated with them. The same inefficiency occurs if the incidence is lower than we thought. Now we need more screeners but we might already have been turning away potential screeners because we thought they were over quota. The solution is to do a good pilot of the survey with a sample that you know will not complete the net N required. Check the incidence based on the pilot and go full steam ahead.

## SSI Recommendations

Balanced starts can be an effective methodology for accurately gauging incidence and accurately profiling a population, but it is a more complex methodology to manage in the field than quotas by completes and its limitations must be fully understood. A high drop-out rate can reduce the effectiveness of this methodology, so steps should be taken to minimize drop-out rates (e.g. by allowing survey restarts and additional field time).

A pilot study or soft launch is highly recommended, as is an extended field time, in order to allow participants adequate time to respond.