Strategies for maintaining long-term panel research data quality

By Emily C. Koenig, Quirk's Content Editor

As marketing researchers develop and further depend on online data gathering tools – for quant and qual studies – the evolution of and trust in panel research has naturally been at the forefront of the industry’s conversation on data quality. Discussions surrounding online panel quality best-practices are not new. In a Forrester Research blog, Reineke Reitsma, vice president and research director at Forrester Research, highlighted the early beginnings of the online panel quality debate. In the post, Reitsma points to Kim Dedeker, then VP of global consumer and market knowledge at Proctor & Gamble, and her 2006 speech which expressed her opinion that the industry – both research suppliers and clients – needed to focus on ways to improve the overall quality of research.

While many believe that Dedeker’s appeal to the industry was successful – sparking initiatives such as ESOMAR’s 28 questions and the ARF’s Foundation of Quality – it is obvious that the quality of panel research data is still up for debate today and much of the discussion is driven by the ever-changing landscape of online MR.

Conversations with industry experts yielded three strategies for maintaining long-term panel research data quality: develop internal approaches to total quality management; place a focus on questionnaire development; and construct healthy relationships with sample providers.

Taking a total quality management approach

Developing a set definition of quality is challenging, even within the borders of marketing research. In general, quality data is fraud-free, representative of the population in question and gathered using attentive research participants. To help ensure data quality standards are being met within panel research studies, experts recommend that organizations follow a consistent process for measuring quality using a total quality management approach with all projects. Michel Guidi, managing director, SSI Europe says, “It’s no good making the best pair of shoes and then using the cheapest laces. Somewhere down the line your shoes are going to fall off.” In short, research can only be as strong as its weakest link. By taking a total quality management approach, research teams have a system in place to design and test surveys; authenticate panel respondents; control sample quality; and clean, aggregate and report data. This process will result in less overall ambiguity when determining data quality.
Time and money constraints often hinder a researcher’s ability to take a total quality management approach to research. David Harris, founder and president of Insight & Measurement, says, “The enormous pressure to get studies done quickly and as cheaply as possible [is a major roadblock].” While it is rare for time and money to be of no object, it is important for companies to take the time and invest money in developing quality research processes.

Bob Fawson, chief access, supply and engagement officer at SSI, agrees with the recommendation that researchers leave adequate time to develop the research process and says it is important to follow a system of self-reflection before, during and after any study. “The largest misperception is that every data quality concern is the participants’ fault,” says Fawson. He notes that researchers must respect the human element of sampling, specifically in regards to recall value. By taking a total quality management approach to any research project, researchers will be more likely to practice the necessary self-reflection to catch data misinterpretation.

**The role of the questionnaire**

Creating and testing questionnaires is a key factor in gathering quality data using panel research, and is also one that is most overlooked due to time constraints, inexperience or low budgets, among other factors. When conducting panel research, teams must create questionnaires that are multi-device-friendly – written for and accessible on both small screens and large – as many respondents rely on smartphones, tablets and computers to complete surveys. Survey platforms must be responsive to ensure maximum attention from panelists.

Harris has long studied questionnaire design and believes that the roadblock to good surveys is the propensity for everyone to think that they can write a high-quality discussion guide or questionnaire. “Everyone would be better served if the details and nuances of discussion guides and quantitative studies were left to people who were trained in the discipline,” Harris says. “No matter how well a panel is constructed and managed, a poorly-written 45-minute survey will not yield quality data.”

Guidi echoes Harris’ sentiment: “Some researchers really think about the respondent when they are writing their surveys. I am convinced that they benefit from better data than those companies that don’t do this.”

First, to ensure that poor-quality questionnaires do not taint panel research data quality from the beginning, Harris says that researchers must imagine the information that they really need to support decision-making. Will the questionnaire support the clearly-defined research objectives? Ian Kiernan, senior vice president of global operations at SSI, says that researchers must also look to see if using an online panel is the right method to meet the overall objective. “We need to accept the fact that some surveys are more suited to offline methodologies,” says Kiernan.

Next, researchers must take the time to develop and pre-test questionnaires. A soft launch is a great opportunity to test quality-control questions in the survey to avoid unfairly penalizing good responses. Fawson is a firm believer in conducting a soft launch and says it is important for researchers to listen to respondent feedback at the outset.
Building trust with sample providers

Much of a sample provider’s quality is determined by how it builds its panels by consistently bringing in recruits from new channels, and how it combines new sources to produce consistent – and representative – data.

Guidi recommends asking seven questions when choosing a panel provider:

1. How long has the provider been in business?
2. What is the provider’s technology infrastructure and investment?
3. What is the provider doing to make their (your) surveys mobile-friendly?
4. How much of the provider’s offerings are proprietary?
5. Does the provider have a specific, separate and dedicated team working on methodology and quality?
6. Is the provider significantly cheaper than other established companies?
7. If research involves more than one country, what is the provider’s international experience and global scale?

By asking the questions above, companies will build a communication line with providers and see which firms have the experience and scale to take on the study at hand. When a provider is stretched too thin or lacks experience, it is unlikely that the technology infrastructure, software and overall compliance will be in place to gather high-quality data or supply the funding to adhere to high-standard quality assurance practices. ESOMAR’s 28 questions is also a good resource for first-time buyers of online samples.

Whenever possible, Harris says researchers should ask a third-party marketing research supplier to review the internal process for choosing panel suppliers. Involving a third party allows for process assumptions to be questioned, leading to more checks and balances during decision-making, which will benefit the overall research quality.

Controlling sample quality

When managing individual participation and controlling sample quality, it is first critical for panel developers to reach potential panelists where they are natively spending their online time. Fawson recommends that researchers should check to see if panel providers are working with influencers, leveraging trusted outside brands, making ongoing investments in testing new methods and have a presence on social channels. Other sample control aspects that should be tested for quality purposes are panel sample quotas and practices for retaining panelists and restricting inattentive panelist participation.

While it is generally accepted that panel research data quality goes up when sample quotas are met – be they based on desired age, gender, geography, etc. – researchers must be sure to work with panel providers to only set quotas that balance the drivers for the subject of the research. Arbitrary quotas will only hurt data quality.

At this step, researchers should again consider the specific limitations brought on by panel research. “Think about what the relationship is between these drivers and the big non-coverage error in online panels: the absence of people who are not online,” says Guidi. “After all, no amount of reaching quotas on age is going to make a 65-plus Internet user the same as a 65-plus non-Internet user. They are different to start with.”
Once a questionnaire is successfully created, tested and launched – and the panel controlled for sample quality – the right team of experienced professionals is needed to ensure that data processing and reporting are done correctly. It is essential that the individuals who conduct this step understand both the context of the study and the questionnaire itself as they must not confuse survey limitations with poor quality data.

**Moving into the future**

Overall, setting up and managing a panel is no easy task – something many teams are finding out for themselves as the popularity of DIY research continues to rise. Guidi says, “One of the original driving forces behind the setting up of online panels back in the day was the real cost in time and money for researchers to be their own media buyers and recruit their own samples. That work has not gotten any easier in the past 15 years.” And without active panel management, the quality of the data collected from the panel will suffer.

On the flip side, Harris believes the DIY movement is a good one as it is putting pressure on the industry to show its value. “Frankly, there are people and [marketing research] organizations that don’t know the fundamentals of qualitative and quantitative research, much less the expertise that really makes a difference,” he says. “So let DIY replace them or better yet, put market pressure on them to up their game.”

Maintaining long-term data panel research quality will be no small task. While the condition of gathering quality data using panel research may appear to be dependent on the ever-changing, fast-paced world of online research technology, experts keep reminding researchers of the importance of active communication, self-reflection and going back to the basics. After all, quality data is derived from research practices that are rooted in a deep knowledge of the principles of research science.