The story of online research is first a tale of stunning growth. Virtually nonexistent in 1995, Inside Research estimates the total worldwide spend on online at US $3.6 billion in 2007 and increasing to US $4.3 billion in 2008. Two inherent features of online have driven this rapid growth: faster turnaround and lower cost than traditional methods. Online has made it possible to gather feedback from consumers almost in real time. Methodologies such as those to drive new product design or advertising testing, that took weeks and sometimes months with traditional methods, can now be executed online in just days. These advantages seemed especially salient in the late 1990s when respondent co-operation was in steep decline and the costs of traditional methods rising.

If online was to be a reasonable option to traditional methods the problem of respondent access and co-operation had to be solved. That solution was and is online access panels. Beginning in the mid- and late 1990s research companies and entrepreneurs throughout North America and Europe convinced millions of people to sign up to do surveys on demand.

The research industry’s long-standing reliance on probability sampling was dismissed as passé. Anders Kiaer’s century-old arguments for the ‘representative method’ were revived. Online evangelists argued that they had the techniques either to create ‘representative samples’ from their panels or adjust online results to account for the offline population. A number of side-by-side comparisons with traditional methods seemed to prove the point, and large numbers of clients embraced the methodology with open arms.

Early warning signs
The first bumps in the road probably came in April of 2005 at the ESOMAR Worldwide Panels Research Conference in Budapest. In his opening keynote, Jeff Hunter, consumer insights director at General Mills, described a concept test in which the same survey administered to different samples from the same panel yielded substantially different signals on whether to launch the product. Digging deeper he discovered that the two samples, while both drawn to be representative, differed in their levels of survey-taking experience. The sample with the greater proportion of respondents with longer tenure on the panel and more surveys taken generally was less positive about the product concept than newer panel members who had done fewer surveys. Researchers from Survey Sampling International presented results from a similar study with a similar outcome. Other presenters expressed concerns about multiple panel membership and the first signs of unacceptable levels of satisficing by panel respondents were described.

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The Budapest conference also hosted a broad-ranging discussion of the need for stronger industry-wide standards or at least guidelines for access panels. ESOMAR introduced its “25 Questions to Help Research Buyers” – a set of questions designed to create the transparency that buyers need to effectively compare and choose among different access panel offerings.

More problems
Soon online researchers were talking about a number of problematic behaviors that seemed to threaten the basic underpinnings of online research. These included concerns about ‘professional respondents’ who had signed up to multiple panels and were taking large numbers of surveys. There also was compelling evidence of people who signed up multiple times with different identities and others who were giving false answers to survey-qualifying questions, presumably to earn the incentive. Finally, as surveys grew longer and became more complex, alarming numbers of respondents seemed to be thoughtlessly clicking answers just to finish.

In September 2006 at the Respondent Cooperation Summit in Chicago, Kim Dedeker, then vice president market and

A web of worries

Online research has been booming but after 12 years of exponential growth, is it losing its lustre? By Reg Baker
consumer knowledge at Proctor and Gamble, told a story much like Hunter had told 18 months earlier in Budapest and openly questioned “the integrity and methodology” of online research. It became hard to go to an industry conference without hearing discussion of the ‘panel data quality crisis’.

**Some solutions**

The industry’s response has come at three levels. First, there now is a great deal of ongoing research on research aimed at understanding the extent of problematic panelist behaviors and their likely impact on survey estimates. While this research has yet to achieve an industry-wide consensus, most access panel providers have taken significant steps to reduce fraudulent and/or multiple registrations by adopting a variety of methods to verify that panel members are who they say they are. In addition, there is the increasingly widespread use of post-survey cleaning techniques that identify and delete ‘bad respondents’ prior to analysis.

Second, many researchers have somewhat begrudgingly admitted that some portion of the problem is due to poor online survey design. Long, boring, or overly complex surveys can encourage satisficing and speeding. There is an enormous range of methods and techniques capable of delivering unprecedented insights to our clients. The challenge is to use them wisely.

Regardless of how all of this gets sorted out we can be sure that the industry’s relentless drive to innovate with new technologies will go on. Where once we talked about proprietary panels we now are talking about online communities. The new age of the interactive web and user-generated content offers clients an unprecedented opportunity to interact with their customers, to gather feedback in real time, and to share it effortlessly across the enterprise. Companies can easily create conversations with their customers as well as among those customers about current products, about satisfaction, about competing products, and about unmet needs. These conversations can be structured (surveys and focus groups) and unstructured (customer driven).

As the industry moves to the next phase we must be sure to absorb the lessons from online thus far. One of those lessons would seem to be to think through carefully how the dynamics of communities might eventually lead to unintended consequences, much as the dynamics of access panels have created the current panel data quality crisis, be it real or imagined. A second lesson might be to stay clear of extravagant claims, especially those that position it as a replacement methodology rather than as still another valuable tool in the kit.

Research today have available an enormous range of methods and techniques capable of delivering unprecedented insights to our clients. The challenge is to use them wisely.

The ESOMAR Guide to Conducting Research on the Internet, as published in 2005, contained a section with 26 questions. These questions were designed to help researchers discuss online access panel research methodology by creating a framework and language for dialogue.

Much has changed since 2005, and so ESOMAR has revised the questions to reflect current issues and to provide an explanation of the reasons why each question should be asked.

The revised 26 Questions to help research buyers of samples on Access Panels and Online Samples, in combination with other information, will help researchers consider those issues that influence whether an online sampling approach is for use in relation to a particular set of research objectives. The questions are posted on ESOMAR’s website, go to www.esomar.org.

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