



ESOMAR

How to improve research participants' experience and enhance data quality



Introduction

This ESOMAR Framework seeks to highlight and address the main problems in the way that researchers interact with research participants. The research industry depends on the co-operation of members of the public, and yet this collaboration or 'partnership' is often taken for granted, neglected or worse, leading to declining response rates. Some of the factors contributing to poor response, often classified as 'participant/respondent fraud', are caused by unprofessional survey methodologies, or badly designed questionnaires and a general lack of consideration for the participant experience.

The Framework is designed to improve the way in which researchers interact with online research participants, and is addressed to providers and clients of market, opinion, and social research services. The scope of this material is online quantitative research and all comments in the material are intended within this scope.

The Framework is part of the Global Data Quality (GDQ) industry initiative¹ which aims to address the key issues contributing to a lack of confidence in sample. Over 30 research experts have been involved in creating this Framework. All of them agree that the way that research participants are treated can contribute to a poor and deteriorating image of research amongst members of the public, low levels of responsiveness, and unhelpful patterns of response; all of which have an adverse effect on research quality. These issues will become worse unless addressed as younger cohorts are cited as having shorter attention spans and place a greater value on experience. The framing of the issues posed in this material is based on the daily working experience of workgroup members, extensive discussion about observed problems and issues, and comparison of relevant metrics.

The Framework takes the form of a statement about each issue, within nine broad areas, and then presents some questions that should be asked to understand the approach being taken by those responsible for designing the study. By understanding whether the topic is being addressed and the appropriate approach being taken, the commissioner of the research will be able to distinguish those research partners who do take participant engagement seriously and will see better quality response as a consequence.

¹ Information about the overall GDQ initiative – including who is involved and the topics being worked on is contained in the appendix to this material, together with details on how to access the GDQ website.

The way in which this material is laid out is also designed to help researchers who are using 'self-serve' options to review and improve their current practices in relation to engagement with research participants.

This Framework marks the start of an ESOMAR/GDQ programme of activity covering 'participant-centricity' to place those who respond to research programmes at the centre of our focus. Through actively considering research participants and their viewpoint, we can address some of the factors that contribute to a lack of trust in sample, leading to higher quality research and better business or social understanding and decision making.

Issue 1: Adequate Skill, Training and Education

Context

It takes skill to design an effective survey; a good grounding in research theory is essential since knowing how to ask effective questions that will deliver unbiased answers requires knowledge and experience.

With the growing use of templated research solutions, where survey questions are pre-defined, sometimes compounded through the use of DIY platforms, and where some researchers are starting to delegate the whole questionnaire writing process to Generative AI, these skills are being lost.

Significant creativity and expertise are involved in crafting questions and responses that will engage research participants and get them thinking in the right way. Survey designers need to think like copy writers, have an eye for design, as well as an open, critical, and empathetic perspective to be able to see questions through the eyes of the research participant. Mistakes can be made through inexperience or a lack of adequate training.

Questions to ask executives or organisations responsible for survey design:

- What skills, experience and qualifications do the researchers creating your survey have in survey design?
- What training have they undertaken in survey design best practice?
- What training do the people who produce/script your survey have in survey design best practices?
- What ongoing training is being undertaken to keep researcher and survey designers' skills up to date?

- If using templated research solutions, what research has been undertaken to test and validate these research methods? Are the templates being kept up to date?
- Within the context of DIY, what steps are in place to ensure the validity of new questions created by DIY commissioners in the platform?

Issue 2: Survey Design

Context

The quality of data derived from an online quantitative research project is heavily dependent on the quality of the survey. Research participants can find the wording of some surveys dry or off putting, the questions repetitive, certain types of question types (e.g., Likert agreement scales) can be overused and so participants become bored and tired of answering during the survey.² To be effective, surveys must be able to engage participants and be crafted in a way that will stimulate them to provide truthful and thoughtful feedback, whilst imposing the minimum amount of burden required to address the research question/s.

Questions to ask executives or organisations responsible for survey design:

Key question:

- **Would you want to answer your own surveys?**

Other questions about the survey experience:

- Are your surveys designed in a way that will engage research participants?
- What efforts are made to visualise and design your surveys and to bring them to life?
- Do your surveys have an interesting narrative?
- Are the questions within the survey asked in an engaging³ way?
- Are the questions easy to understand – are they written in accessible, clear, unambiguous, everyday language? (e.g., not research speak or jargon)
- Do you provide accurate and realistic information to research participants about the length of the survey and about the subject of the survey at the start of the survey?
- How much work is it to complete your survey? Are you over burdening research participants with complex, difficult, or repetitive tasks, and/or including too many mandatory open-ended questions?

² Source 1– Jon Puleston. ASC Conference London 25 May 2023

³ It should be noted that it may not always be possible to ask questions in an engaging way, and this should not influence the objectivity or validity of the question. However, wherever possible the participant experience should be a central consideration and considering issues such as narrative and engagement will help this consideration.

Bias⁴:

- Are the research questions formulated in an objective and unbiased manner?
- Are all the questions inclusive? Is anyone likely to feel patronised or excluded in terms of how any of the questions are being asked?
- If you are running the survey in more than one country, how well do the questions you are asking translate into other cultures and languages? Is the meaning maintained?

Usability:

- How ergonomic is the survey experience: is it presented in a logical, readable, understandable, and legible way?
- Has consideration been given to how well the survey experience works for different participant groups, younger and older participants, and vulnerable groups?
- Are your surveys designed to work effectively on different platforms and devices?
- Is the questionnaire designed in a visually appealing way? Does the survey adhere to any online visual design standards for example the [Google material design framework](#) to ensure clarity?
- Is the survey feasible for the visually and aurally impaired for people using screen readers?
- Are there procedures that allow research participants to pick up where they left off if they are interrupted or to correct an answer if they subsequently realise that they had misunderstood a question?

⁴ This material focusses on the main issues of bias in respect of survey design, whilst acknowledging that there are other issues which create response bias not covered here due to the large scope of this specific topic.

Issue 3: Survey Length

Context

If surveys are too long, research participants can find it difficult to properly concentrate, which leads to high levels of fatigue and drop out, and yet many of the answers from survey questions often go unused.

Questions to ask executives or organisations responsible for controlling survey length:

Key question:

- **How much of the data you are gathering from your surveys are you using?**

Standards and procedures:

- Do you monitor/audit how long it takes to complete your surveys?
- Do you have any maximum completion time standards?
- What procedures do you have to reduce the completion time of your surveys?
- Is there an indicator to show research participants how much of the survey they have completed?

Questions to ask about optimising the length of your surveys:

- Is every question necessary? Do you know what will be done strategically with the answers to each question? Is it a nice to know or need to know question?
- Are all the questions written as efficiently as possible noting that participants spend over 60% of the time reading the questions when completing a survey?
- Do you review the survey for repetitive questions?
- Is there effective routing/logic in the surveys to ensure no unnecessary questions are asked?
- Are you integrating already known demographics or profiling data from the sample provider into the survey, so they do not have to be asked again to minimise research participant friction?⁵
- How do you ensure there is a fair balance of time between the research participant reading the question and answering the question? What guidance do you have for this?
- Are you using meta-analysis to streamline and remove questions which are not adding value?

⁵ See ESOMAR Demographic Best Practice guidance.

Issue 4: Screen out Procedures⁶

Context

The research industry operates with an unacceptably high failure rate.⁷ This is because there is a high proportion of people that fail to complete a survey because they are not in the target audience, or a quota is full or because of drop out from a survey. Frequently research participants answer a myriad of questions before discovering that they do not qualify for a survey. Prospective research participants are often given little or no reward for the work they put into answering screening questions.

This is an important cause of declining response rates as research participants who are screened out may never return to complete another survey⁸.

Questions to ask executives or organisations responsible for screen out procedures:

Key question:

- **What are you doing to minimise the levels of screen outs and quota fulls⁹ from your surveys?**

Other questions:

- Is your target audience feasible to reach? What preliminary research or evidence do you have to quantify the size of your target audience.
- Are you setting quotas via your survey that would be more efficiently done by the sample company by setting invitation quotas (i.e., invite specific quotas or people in specific target groups who you know will qualify to participate so that everyone who receives an invite would qualify).
- Are all the questions in the screening section being used for the targeting process or are there any questions that could be asked post screening?

General considerations:

- What router procedures are in place to optimise the utility of research participants?

⁶ It is the view of the workgroup members that screen out procedures are very much part of the participant experience and should be actively discussed as part of the overall research process.

⁷Source – project workgroup.

⁸ Source – project workgroup estimate.

⁹ Quota full is an operational research term which means that you may have fulfilled the sample requirements on one demographic part of your sample and remain short on another.

- How many questions do you think is acceptable to ask before screening someone out of a survey?
- How are you incentivising people who are screened-out of your surveys?
- Are you using industry standard screening questions, wherever possible, to ensure the efficient utilisation of sample?
- Are you using screener information for any additional analysis within your research project? Are screened out research participants rewarded for providing this information?

Issue 5: Quality Assurance (QA) Procedures

Context

Once a survey is created you need to check that it is working as intended; that the survey is effective and produces usable data.

Some surveys do not work properly on all devices which creates research participant friction. Poor translation can also generate significant quality issues. Piloting can ensure that the questionnaire can be improved to meet a high-quality standard.

Questions to ask executives or organisations responsible for quality procedures:

Key question:

- **What QA procedures do you have in place to ensure you are sending out good quality surveys that research participants can complete to a high standard?**

Other more specific questions:

- What procedures do you have in place to check the quality of local language translations and that they are phrased in the right cultural context?
- How do you ensure your surveys work effectively on different devices and platforms?
- Are your surveys accessible to all groups of people?
- Are you testing that your surveys can be completed by people using screen reader devices, and by the visually and aurally impaired?
- Do you pilot your survey before launching? What size of pilot do you recommend?
- What types of data quality checks of the pilot data from surveys do you recommend?
- Do you check the time it takes to complete the survey, and the efficiency of the screenout section of the survey?
- Do you undertake any non-response analysis – examining which people may not have answered your surveys and if this may result in any non-response bias?

General operational standards:

- What general audits do you undertake to monitor the quality of your overall survey output?
- What general usability testing has been undertaken of your surveys?
- What procedures do you have in place to check for cheaters, speeders, straight liners, and fraudulent research participants?¹⁰

¹⁰ The GDQ Programme has a specific workstream on fraud which is elaborated on the GDQ website.

Issue 6: Assessing and Measuring General Survey Satisfaction

Context

Poor overall survey experience is an important contributor to declining response rates and poor-quality data. For younger people in particular, surveys do not generally match their expectations for a good consumer experience, and this is reflected in the fact that survey participation rates by those aged under 35 shows a higher rate of decline than older age groups.¹¹

Questions to ask executives or organisations responsible for measuring survey satisfaction:

Key question:

- **Are you measuring research participant satisfaction with your surveys?**

Other questions:

- Do you audit and/or monitor the quality of surveys in any way and how do you do this?
- How are you measuring survey satisfaction levels from research participants, and can you provide normative data for similar projects?
- Do you compare satisfaction rates by e.g., completion platform, demographics, interview length, questionnaire topics, panel member length of membership, and/or countries?
- Do you have any minimum standards on the quality of surveys you allow research participants to take?
- Are you feeding back consumer feedback about the survey experience to the survey designers, survey writers and the end `users of the research?
- How do you ensure that issues identified by participant feedback are rectified?

¹¹ Source – workgroup estimates

Issue 7: Tackling Drop Out

Context

Poorly designed, tedious, and overly long surveys lead to research participant fatigue, lack of concentration and participants dropping out before the survey is complete.

Questions to ask executives or organisations responsible for the survey:

Key question:

- **Are you monitoring dropout from your surveys?**

Other questions:

- What do you view as acceptable levels of dropout?
- Do you have any standards on the maximum level of dropout from your surveys?
- Is there ongoing monitoring of dropout rates, comparing dropout rates by demographic, survey topic, device type and region? How does this compare?
- Are you examining what is causing dropout in your surveys?
- Do you have proposals for recommended practice for minimising dropout?
- Are you gathering feedback from those research participants who do not complete your survey?

Issue 8: Evidence of what Good Survey Design looks like

Context

One of the challenges for our industry when it comes to improving survey design is that there is insufficient exposure to information about what a good survey looks like.

Questions to ask executives or organisations responsible for the survey:

Key question:

- **What examples and case histories can you provide of the standards of survey designs you offer?**

Other questions:

- How well do research participants rate the surveys you field? What is the average completion rate and satisfaction score?
- Do you have examples of alternative approaches to survey design?
- Do you have any demo surveys to show what the surveys you produce look like?

Issue 9: The importance of Regular Review

Context

To address the key issues around research participant experience, a general discussion between clients and research companies/researchers about how the topic of participant-friendly survey design impacts the quality of research programmes, and any review of impacts and development of programmes to improve is recommended.

Topics for discussion between end research users and those designing and implementing research programmes to help improve quality in this area:

Key question:

- **Do you have review meetings with your clients to discuss and address survey quality issues?**

Other questions:

- Have you undertaken any basic survey design training yourself to enable you to review the research you commission more effectively?
- Are you building in enough time to create a high-quality survey within the overall research programmes you are designing?
- Do you feel you have the right survey development procedures in place?
- Have you ever tried to quantify the impact that poor research participant experience has on the quality of your research data using performance metrics?
- Have you ever asked for an audit of your surveys from an experienced survey designer?
- Do you have any procedures in place to review your surveys and ensure they are kept up to date? For example, with any trackers you run do you undertake an annual review of which questions are working and not working, or need updating? How are you future proofing your research studies?

For more information.

- Global Data Quality initiative website
<https://www.globaldataquality.org/GDQresources>

Note that this site also includes a consistent terminology reference sheet produced by the Insights Association in the context of this project which applies to this document,

- ESOMAR Best Practice on Measuring Demographics <https://esomar.org/codes-and-guidelines/best-practice-recommendations-for-measuring-international-demographics>
- Market Research Society (GB) guidance on Mobile Survey Optimisation
<https://www.mrs.org.uk/resources/mobile-optimisation-research>

Who was involved in this project.

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If you would like to be involved in the next stage of this project, please email professional.standards@esomar.org