

itracks



Online Recruiting for Qualitative Research

itracks Seminar Series #2

Presented by Adam Dumont



Qualitative Research Data Collection with itracks Seminar Series – Session 2

Today's Agenda

1

Recruitment Process

A presentation by itracks' resident recruitment expert, Adam Dumont, on the recruitment process he uses to maximize show rates & engagement.

2

Presentation Questions

A break for questions about the material that Adam presented.

3

Software demo: Broadcaster Tool

Adam will do a quick demo on the itracks software's Broadcaster tool. This is the tool you'll use to complete this week's homework assignment: sending an invitation to a participant.

4

Demo Questions

Questions about the software demo or anything else.



Online Qualitative Recruiting



Online qualitative recruiting is the process of finding, vetting, and preparing participants for an online research project.

A successful participant recruitment will result in participants who...

fit study parameters

Participants should fit within the demographics or behaviours required of your study, as well as have access to the technology required to participate.

are who they say they are

Look out for imposters! Due to incentives for participation, some potential participants may misrepresent themselves in order to be selected.

show up

Once you've gone through all the effort of recruiting the right people, you want to make sure they actually show up to participate in the research.

are engaged

It is important that participants not just show up technically, but show up with the energy and intention to fully participate.

Aim for show rates that are **high** and **predictable**.

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Client List**

Average Show Rate

92%

77%

Lowest Show Rate

79%

32%

Standard Deviation

7%

18%

*Show rates for projects conducted by itracks where the full participant recruitment was also carried out by itracks using the process outlined in this presentation.

**Show rates for projects conducted by itracks where participants were provided by the client using a recruitment process unknown to itracks, with no additional participant vetting before the research took place.

The Process

- 1 Screener**
- 2 Re-screen & Articulation**
- 3 Invitation & Reminders**
- 4 Incentive**

Sample Source

This recruiting process is designed to work regardless of where the participant sample comes from initially.

Examples of potential sources for your participants may include:

- Online research panel services
- Pre-existing Lists
- Social Media Advertising
- Community or special interest groups

1. Screener



Verify important demographics

Even if you've filtered for a specific age/gender/etc. in panel filters or through social media profiles, you should verify the demographics that are important to your study in your screener survey. You don't know when the participants joined the panel, or whether the information they have on social media is accurate or current.

Drill down further

Include additional parameters for participation in your study - are there certain characteristics or behaviours that you need in your participants?



Keep it brief

Keeping the time to complete your screener to 5 minutes or less will mean you get more potential participants completing your survey.

Example Recruit Request

We are interested in hosting a month-long panel of approximately 15 U.S. Adults that is relatively representative of the general population, with a few exceptions where we want to specifically target key constituencies (i.e., Left-wing).

- n=15
- US Nationwide
- Age 18-65 (mix of ages)
- 50% male/50% female
- mix of ethnicity
- leans left politically



2. Re-screen and Articulation

At this step, we are looking for:



Consistency

Does the participant appear to reflect the demographics they gave you in their screener? Do their responses to questions match what they gave you initially?



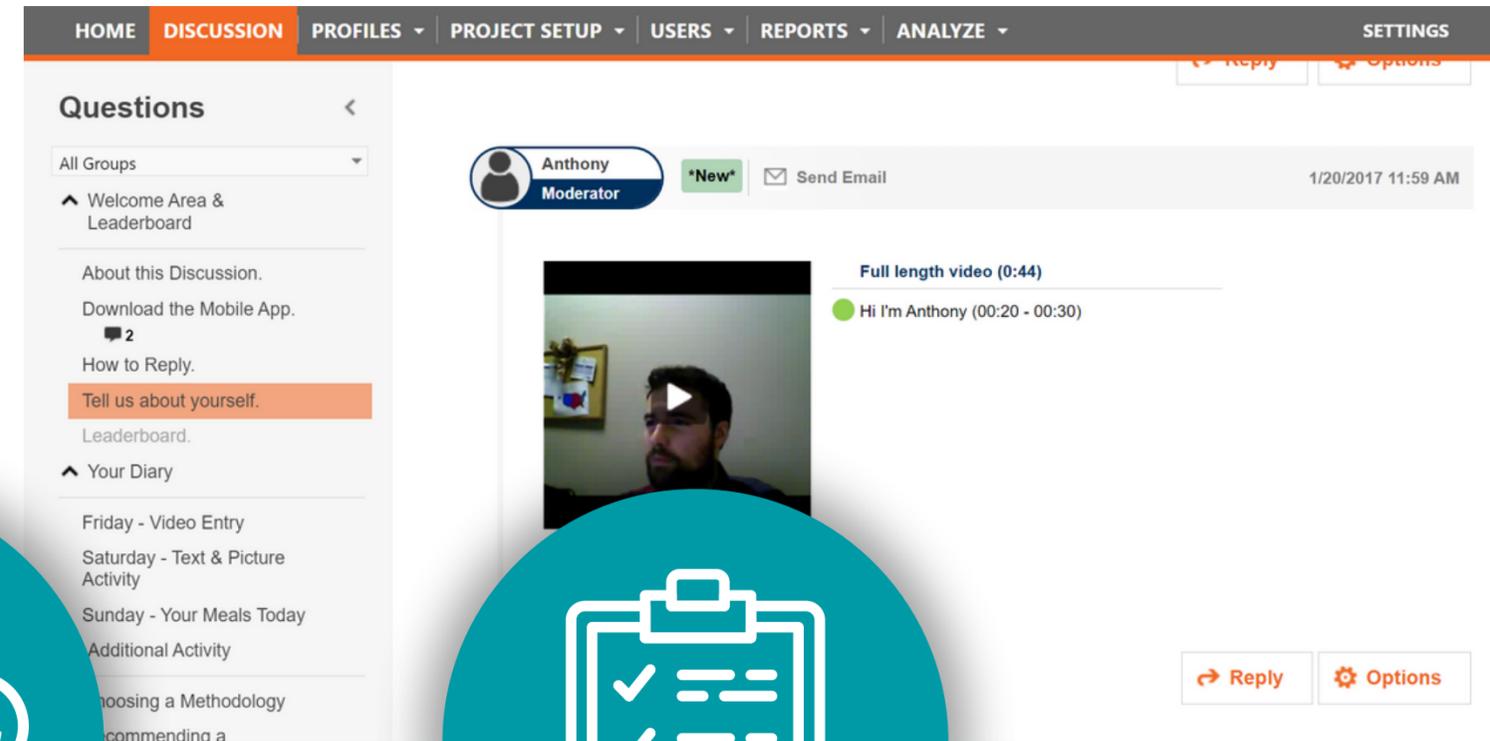
Engagement

Make sure your participants are able to engage at the level required for you to get the data you need for a successful study.



Tech Requirements

Having participants upload a video of themselves into the research platform verifies that they have the necessary technology and capabilities required to participate in online research in the platform.



This is the most unique step in the process, and the one most frequently skipped that leads to lower, less consistent show rates.

3. Invitations & Reminders



Choose the right channel(s)

Communicate via channels and methods that are familiar and comfortable to your participants. If they are used to email and will check it, this can work well, but if not, you may have to use texting, WhatsApp, or another method they prefer.

Include a calendar item

Make sure your initial invitation and reminders include a calendar item (something that allows them to easily add the session, with all relevant information to their digital calendars). This will make it much more likely for them to remember, and to have all information at hand when the time comes.



Remind (more than once if necessary)

Remind them of the upcoming study before it starts. If it's an asynchronous study that requires ongoing participation, you may want to schedule automatic daily reminders for them as well.

Incentives (or Honorariums)

itracks uses Virtual Incentives for our online incentive distribution, but there are several other options.

Whatever the size and type of your incentive/honorarium, make sure that you:

- Communicate the details clearly at the beginning of the process
- Include clear details as to what is required of the participant in order to receive the incentive
- Include the expected timeline of incentive distribution



Recap & Questions



Screener Survey



**Rescreen & Video
Articulation**



Invite & Remind



Incentivize