

Research Brief Series #4: When Does Use Become Abuse in Panels? Considering Panelist Burden

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If there is one identifying difference between participating as a cross-sectional survey respondent and being a member of a multi-client panel, it is of course that with multi-client panels, panelists sign up to participate in multiple surveys. While voluntary, there are nevertheless some questions, if not concerns, with what exactly panelists sign up to do. For one, there is likely little real sense for just how many surveys a panelist will take over their tenure with a panel. It as well might be the case that panelists do not have a complete sense of the number of times they will be communicated with, and specifically how many invitations to surveys they will receive. They as well cannot be aware of any degree of repetition on topics and questions asked over time, nor with knowing the length of surveys given or likely the experience itself of taking surveys on a repetitive basis.

All of these factors may play into driving a panelist toward fatigue, lower participation rates, or complete withdrawal from the panel. They may also lead to low survey data quality as some panelists may speed, straightline, or skip questions, or otherwise satisfice in their answers [See Research Series note on this topic for more). The ability to research the degree to which these may be true, however, is limited. For one, what might be burdensome for one panelist may be enjoyable by another. Even the simple notion that panelists who chronically take longer to complete surveys are more burdened is suspect: Burden is in the eye of the panelist.

Without a clear understanding of the effect of burden on panelist participation it is perhaps best to assume that burden will impact data quality and participation to some degree, and that it will affect some more than others. If

indeed the impact is systematic then the impact on total survey error could be more significant than if burden had a more unified impact across the population.

The Center's Perspective

Given that the effects of burden are still not well understood, it is prudent to do what is possible to minimize burden reasonably. There are some standard best practices to be employed. First of course is to communicate as clearly as possible what the burden will be. As one example, NORC's AmeriSpeak® accomplishes this by describing during recruitment the anticipated frequency of survey requests, length of surveys, and frequency of communications. As well, we disclose at the beginning of every survey the expected length. To ensure that such communication is accurate, we periodically compare actual length to the expected length to ensure our communicated estimated length is accurate.

There are other strategies AmeriSpeak employs to moderate burden. For one, there is a goal to maintain a protocol of one survey invitation per week. And indeed, that has been our average since the inception of the panel. We have successfully modelled recruiting efforts to "right size" the panel with this level of burden in mind. This is, to our knowledge, the lowest rate of invitations in multi-client panels. Indeed, most opt-in panels have rates of invitation over three times higher. We consider this frequency to be a "goldilocks" zone whereby panelists maintain engagement, but are not burdened to a point that generates deleterious effects on data quality and panelist willingness to participate.

A second strategy is to limit the number of surveys a panelist receives on a specific topic. It is a rare occurrence that such situations arise, but notably, during the COVID pandemic AmeriSpeak was fielding many surveys about COVID. As such we developed an algorithm to ensure that panelists did not receive more than a subset of all surveys about COVID during 2020-2021. We further educate our clients on survey length and do everything possible to encourage them to field “unbloated” surveys that keep length to a minimum. We allow panelists to opt in and out of communications by platform, including email, text and telephone.

Finally, our methodologists are highly versed in questionnaire design and specifically aim to ensure an optimal design by device. This is particularly important with mobile phone displays, of which there are many screen sizes and operating systems and for which many questions (for example, grids) are burdensome to complete. We consult with our clients when we see bad practices in their questionnaires, such as long grid questions and insulting 'trap' questions, in order to identify solutions consistent with long term panel health. As well, it is important to periodically field panelist satisfaction surveys to understand the degree to which they feel they are taking too many surveys, surveys that are too long, etc. And finally, we periodically end surveys with questions designed to assess how much burden they might have felt in participating in that survey.

While burden does not have well understood effects, it is clear that whatever impact high burden has is detrimental to data quality and panel participation. As such it behooves panel managers to do what is possible to find a reasonable sweet spot of maintaining panelist activity without asking too much of them.

ACKNOWLEDGEMENTS

We would like to thank J. Michael Dennis for his review of this brief.

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