



## **Saros Research Recruitment for Online Qualitative Projects**

Recruitment for online qualitative research needs to be approached with the same rigour and standards as for any other qualitative recruitment. There are two significant differences however, one of which makes recruitment easier and one of which makes it more difficult. But for clarity here are the two approaches compared side by side:

<b>Recruitment stage</b>	<b>Recruitment for traditional/face to face qual</b>	<b>Recruitment for online qual</b>
<b>Source of respondents</b>	The Saros Research Database of over 175000 respondents (growing at over 1500 per month) from across the UK via online and offline methods. Respondent demographic history and any research participation are centrally tracked.	The Saros Research Database of over 175000 respondents (growing at over 1500 per month) from across the UK via online and offline methods. Respondent demographic history and any research participation are centrally tracked.
<b>Preliminary short list of respondents to contact</b>	Based on research history + demographic factors according to recruitment spec INCLUDING PHYSICAL LOCATION	Based on research history + demographic factors according to recruitment spec – PHYSICAL LOCATION IS IRRELEVANT
<b>Initial contact with respondents</b>	Email inviting them to apply for project online (possible direct contact by phone for older or digitally excluded groups)	Email inviting them to apply for project online
<b>Online responses submitted</b>	Analysed by trained human interviewer to establish shortlist to call	Analysed by trained human interviewer to establish shortlist to call

<b>Research-specific eligibility factors tested</b>	In thorough telephone interview by trained research booker	In thorough telephone interview by trained research booker
<b>Effective participation eligibility factors tested</b>	Enthusiasm, ability to be imaginative/projective, clear spoken and easily comprehended English	Enthusiasm, ability to be imaginative/projective, self-assessment of ability to use chat software-IM (if synchronous session), or familiarity with bulletin-board software. For any board or IM-based project, the ability to express themselves clearly in WRITTEN English needs establishing
<b>Possible additional test</b>		Research booker dialogue with potential respondent via IM for synchronous session
<b>Written confirmation to respondent</b>	Including address and directions etc	Including links required to enter discussion room, as well as schedule/requirements for testing access
<b>Telephone reminder</b>	Within 24 hrs prior to session	Within 24 hrs prior to session
<b>Incentive payment</b>	Usually paid by viewing facility or researcher at time of participation	Usually paid by BACS or Paypal, can be by Saros or researcher.

The 'easier' factor is simply that online qual/ online recruitment takes the geography out of the equation. If you want busy company directors, niche occupations, housebound disabled people etc, we can recruit them from all over the country – or further afield – and bring them together to contribute to your project. Bad weather, tube strikes and traffic problems cannot mess up your group, and it is also a fantastic opportunity to engage the huge swathes of the general population who simply don't live anywhere near a viewing facility.

The 'difficult' factor is it simply isn't suitable for everyone. For synchronous sessions involving IM software in particular, it is fundamentally important that the respondent is confident and quick to master new applications, that they can touchtype (speed is more vital than accuracy, but not everyone is actually comfortable with typing *badly* in front of other people and would rather go quiet!), and also that they have the kind of brain that can both type and read fast enough to keep up – as discussions with multiple users quickly scroll off the page in a small window. If someone has to look at their hands instead of the screen to contribute, or are hung up about correcting their typos, they will

miss things and ask about things already covered, which will break the flow of the discussion.

This range of skills can be established in a number of ways, including asking respondents about their existing chat habits – anyone who is accustomed to chatting on MSN etc is likely to be fine. But for any synchronous session involving multiple respondents on any platform we prefer to interview them directly via Skype IM, to see just how quickly they really can contribute.

One big mistake to avoid is assuming too much based on demographic groups. Sure, a lot of under-25s communicate via text and IM as a default setting, and might be a lot more articulate that way than face to face, but you can't count on it – conversely, neither can you assume that older people aren't switched on and able to take part. We have found mature female respondents who are relatively non-technical BUT have touch-typed for 40 years adapting extremely well for example, and sometimes the most unlikely people are chat addicts on the side. A careful exploration of activities, abilities and confidence in the screening process is essential, as well as direct testing if unsure.

Of course with asynchronous groups the fast typing isn't crucial, but familiarity with bulletin board functionality and netiquette is a huge asset. Screening questions can establish whether people already use services like Yahoo groups or Facebook, whether they understand how to follow a threaded discussion, reply in the right place, upload files/pictures etc, (not to mention turn their autoresponders off...)

With bulletin-board style projects there is far more capacity to coach respondents into the right place and engage a wider variety of respondents than possible in an IM. However the time and resources to do this have to be built in to the project plan. It's a good idea for the recruiter to be a moderator on the group and be responsible for getting everyone logged on and set up in good time before the session officially commences, and to remain involved throughout the lifetime of the project to deal with either technical problems or issues of respondent non-engagement.

In terms of respondent briefings for bulletin-board projects in particular, we think it's really important to establish up front precisely what the 'contract' is with respondents, ie the required level of effective involvement. With face to face qual, respondents effectively get paid for showing up, even if they are for some reason useless and non-contributive, but with online it's intrinsically woollier and needs defining. For example using a statement like:

*“The project will be run as a bulletin board involving 10 respondents, over a 3 week period between x and y dates. You will need to log on to the board during the 4 days prior to the project kick off, to make some test posts and deal with any queries or support issues, so that we can ensure that everyone can use the software without difficulty. To receive your full incentive we expect you to log on to the board at least once every 48 hours, and respond to at least 2 of the threads raised by*

*the moderators, ie making at least 30 separate posts over the lifetime of the project. Of course, we hope that the discussion will generate its own momentum and you will be minded to engage more actively than these minimum levels, and follow up discussions and dialogues of personal interest and contribute more regularly”*

This statement needs to go out in the written confirmation, and the pre-project testing should eliminate issues of respondents being unable to connect, to post, trying to blame technical issues for lack of involvement, OR simply misunderstanding what is required of them. Retaining the recruiter throughout the lifetime of the project helps a great deal with chasing people up if they go quiet at any point and hopefully resolving problems quickly.