Choosing a sample and platform: Research design considerations for online testing

Jessica Holzberg
Center for Survey Measurement
U.S. Census Bureau

FedCASIC

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How do I conduct online tests?

- There are a number of services for online testing: how do you choose one?

- Two important aspects of research design:
  1. Getting respondents
  2. Administering the research task

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Getting respondents: Sample sources

Managed recruitment

Open marketplace

Advertising campaigns

Managed recruitment

- Outside company provides respondents from proprietary panel
  - May be probability or non-probability panel
- Can specify who you want
  - Quota samples
  - Targeted recruitment
- Methodology varies and is sometimes opaque. Ask questions!
- Can be more expensive than other options

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Open marketplace

- Researchers can post studies on open marketplaces
- Fast!
- May have less control over who sees and takes the study
  - Use limited screeners available from the marketplace
  - Build screeners into the study
- Incentive determined by the researcher
  - $1 for a 10-minute study common

Advertising campaigns

- Paid advertisements on websites, social media, apps (AKA river sampling)
- Advertising can be targeted
- Potential respondents may not be looking for research studies
  - Your mileage may vary in terms of click-through, participation rates
- Costs vary

Selecting a sample source

1. How much money do you have?

2. How hands-on do you want to be?

3. How specific are your sample requirements?

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Sample choice involves trade-offs

	Managed recruitment	Open marketplace	Advertising campaigns
Cost	☹️	😁	☹️
Ability to target specific respondents	😁	😐	😁
Amount of researcher involvement needed	😁	😐	😐
Risk	😁	😐	☹️

Administering the research task: Platforms

Survey platforms

Other platforms

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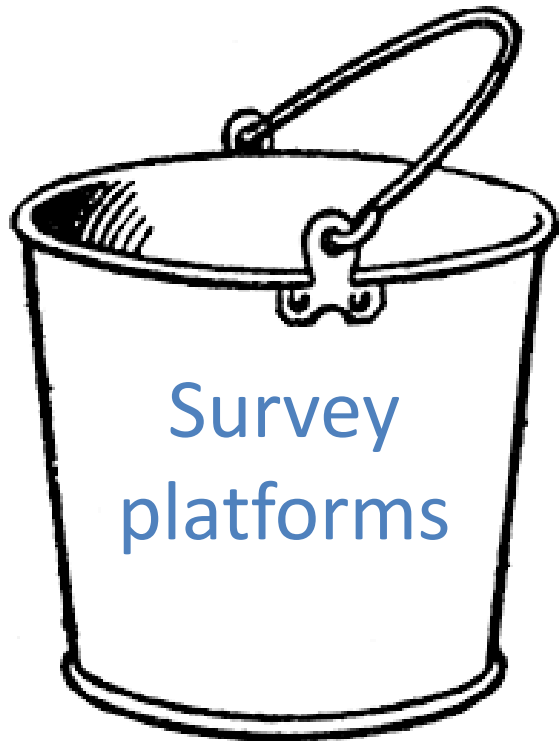
Survey platforms

- Designed for general research
- Can build an instrument with text, questions, images, etc.
- Some have skip patterns, randomization
- Commonly used due to flexibility for a wide variety of tasks

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Other platforms

- Designed for more specific research purposes (e.g., usability testing)
- Capabilities may include:
  - Capture of respondent audio/video
  - Tracking of mouse clicks, other paradata
  - Ability to test a live website within the study
- May be less flexible for other uses

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Selecting a platform

1. Are you primarily concerned with survey responses, or something else?

2. How specific are your data requirements?

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Selecting a platform (cont.)

Questions to consider:

1. **Are you primarily concerned with survey responses, or something else?**

   – Survey responses ➡ Survey platform

   – Something else ➡ See if another platform is available for your needs; else use survey platform

2. **How specific are your data requirements?**

   – Investigate options within platform type

Sample and platform choices should be made jointly

- Some sample providers require you to use their platform to access their respondents
- Think about what you need for both before committing

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Conclusion

- Online testing is easy, fun, and fast
  - Be aware of limitations (e.g., sample representation, type of task)
- There are lots of options out there
- The "best" one to use depends on your research question, resources, and personal preferences

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