

# QRCA WHITE PAPER

## Social Media Comes to Qualitative Recruitment: A Study of its Use Today



*A study by the Qualitative Research Consultants Association (QRCA) finds that social media use in recruiting for qualitative studies – whether online, in-person or by phone – is on the rise and expected to continue growing. Recruiting through social media websites and discussion forums, the organization’s Field Committee study suggests, has several key advantages: most notably, to locate hard-to-find/low incidence respondents and to verify some respondent information. The study, conducted with field service managers and qualitative research consultants, also identifies several issues, such as less trustworthy social media sites and protection of respondent privacy. Effective use of social media research should be combined with follow-up telephone recruiting methods, study participants emphasized. The committee’s report outlines this and other best practices.*

### 1. INTRODUCTION

The growing role of social media (SM) in global society generally and in the marketing field more specifically is one of the top trends today. In the qualitative research area, many studies now incorporate SM “listening,” blogs and other online methods. If advanced technology is a good thing, it might be argued that advanced accessibility is also a good thing in our field: SM provide new ways of reaching potential respondents and recruiting them for our studies, so why not use the most modern approaches to “connect” with consumers and businesspeople? The situation, however, is more complicated, as a number of concerns regarding participant credibility and project integrity have been raised in the research industry.

The QRCA Field Committee (FieldCom) took up the task of exploring the current state of social media in qualitative recruiting, its advantages, potential pitfalls and ideas concerning best practices.

Two online bulletin boards were conducted in the U.S., with a total of 24 participants in the discussions. Nineteen were owners/managers of field services with experience using SM, ten of them also qualitative research consultants (QRCs) who are field service clients themselves, commissioning recruiting in other markets; six are solely on the QRC side. FieldCom thanks them for their help in

the study (their names are listed at the end of this paper). Field Committee researchers on the study were Michelle Finzel, Helen Karchner, and Judy Langer. FieldCom also thanks 20/20 QualBoard and iTracks for contributing the use of their online bulletin board platforms for the discussions. The discussions took place in January and May, 2011.

Social media was defined for the study as including various online technology tools that enable people to communicate, share information and resources via the Internet and mobile devices. These tools include text, audio, video, images, podcasts, and other multimedia communications. Facebook, Twitter, LinkedIn, and Craigslist were given as examples of SM sites.

It is important to emphasize that this study is qualitative, based on a small sample and semi-structured questioning, so the hypotheses discussed here should be viewed as tentative. Some comments by participants have been edited for conciseness, clarity and punctuation.

### 2. SUMMARY

This study by the QRCA Field Committee suggests that the use of SM in recruiting for qualitative research is on the rise and expected to continue growing. SM is employed across methodologies, not just online but also for in-person and telephone



studies. Recruiting through SM websites and discussion forums is seen as having several key advantages: most notably, for locating hard-to-find/low incidence respondents and verifying some respondent information. The study, conducted with field service managers and qualitative research consultants, also identifies several issues, such as less trustworthy SM sites and protection of respondent privacy.

Best practices recommended by study participants include: use the more reputable SM sites; use SM only as a pre-screening tool, following up with detailed screening by phone; initial messages and pre-screens should not give away too much information about study specifications or use language that attracts “professional” respondents; respect respondent privacy, do not pass along respondents’ “personally identifiable information” to clients; consider a special non-disclosure agreement that states respondents will not divulge proprietary study information on blogs or online forums; follow SM proper etiquette, such as not being intrusive; be as transparent as possible about who the recruiter is, reasons for contacting respondents, the general study topic. Training of recruiters is also recommended since this is still a new approach to recruiting.

### **3. MAJOR HYPOTHESES**

*SM use in qualitative research recruiting seems to be on the rise and is likely to continue growing, according to QRCA study participants, although it is not expected to replace regular recruiting in most cases.*

*Advantages of SM recruiting cited by participants center on the method’s use in locating normally difficult (if not impossible) to find respondents and for verifying some respondent information. SM recruiting can save field services – and as a result, clients – time and effort in recruiting; further, in some cases it may be the only realistic way of finding relevant respondents.*

*Issues and concerns were also pointed out by participants: SM does not reach everyone; it should not be used alone without regular phone follow-up screening and confirmations; it can be time-consuming; some sites are less trustworthy (Craigslist in particular was named); respondents recruited solely through SM often do not fully understand or value the research process (a*

problem with other forms of recruiting such as random digit dialing, also known as RDD); recruiters and QRCs need to be careful about protecting respondent privacy, and so on.

*The question of whether clients should be informed or asked permission about recruiters using SM evoked divided reactions. Field services who do tell their clients that they plan to employ SM recruiting may need to provide education on its benefits and steps taken to maintain quality.*

*Best practices suggested by participants combine pragmatic and ethical considerations:*

- *Use the more reputable SM sites, avoiding ones that recruiters have found to attract people who are more likely to lie about their qualifications.*
- *Use SM recruiting only as a pre-screening tool, following up with detailed screening by phone.*
- *Word initial messages and pre-screens carefully, not providing too much information about the study specifications or using non-professional, hyped-up language since this can attract “professional” respondents. (Note: similar guidelines have been recommended for e-mail blasts and other recruiting methods.)*
- *Respect respondent privacy. While SM sites can be useful for recruiting and for verifying screen answers, recruiters should not pass along respondents’ “personally identifiable information” to clients.*
- *Consider a special non-disclosure agreement with a provision stating that respondents will not divulge proprietary information from the study on blogs or online forums.*
- *Follow SM proper etiquette on online forums and community sites. For example, recruiters should not intrude on discussions without regard for participants’ feelings and desire for privacy.*
- *Be as transparent with respondents as possible, telling them about who the recruiter is, the reasons for contacting them and the general topic of the research without revealing so much about the study in advance as to jeopardize the research.*

The Field Committee suggests some other points for field services:

- *Training of recruiters might be very helpful since the use of SM recruiting is still relatively new.*



- Consider informing and educating field clients (both QRCs and end clients) about plans to use SM recruiting for a project, the reasons for that choice and guidelines that will be followed. While this may prove to be unnecessary, it can prevent communication problems later.

## 4. DISCUSSION

### ***How Much Is SM Recruiting Used?***

*Estimates of the extent to which SM recruiting is currently used varied widely among study participants. Asked how widespread it is, based on what their own company does and what they have heard, participants said anywhere between a relatively low amount (10%) to the majority of studies (75%). Participants reported using SM recruiting more for consumer participants than for business participants.*

*Many professionals have published phone numbers, faxes, etc. Often don't need to use LinkedIn, etc. to find them. With consumers, Facebook, etc. is great at spreading the word and getting referrals.*

*For consumer-related studies, it's pretty high. We use Facebook, e-mail and text messaging daily.*

The fact that SM has entered qualitative recruiting, to whatever extent, is not surprising to participants. Why wouldn't it play a role now, some asked, given that SM is simply part of today's world.

People are essentially building an enhanced digital profile online. We as researchers/ recruiters are tasked with forming relationships and engaging people. The more accurately and efficiently we can build those relationships and form new relationships with the "right" people, the more effectively we can perform our tasks.

### ***When and Why SM Recruiting Is Used***

*Use of this form of recruiting cuts across methodologies and types of studies. While SM recruiting may seem obvious for online research studies – after all, potential respondents are already engaged online – it is in fact employed for "traditional" types of qualitative studies as well. This includes face-to-face interviews (at facilities, in homes, etc.) and telephone studies, both consumer and business-to-business.*

*SM recruitment can be used for all types of qualitative projects. We typically work with online qualitative so we tend to recruit more for this space.*

*Typically SM recruitment supplements other recruitment methods. These sites are (and should be) the first – not the last – step in recruiting, several participants emphasized. SM can help to locate potential respondents by identifying people who appear to be the types needed for a study. Invitations can be sent out with a general description of the study. People who express interest in participating can easily be moved to an online platform for more specific screening. (The initial contact may simply say the field service is recruiting for a study concerning a certain product category; the screener then asks about frequency of use, brands bought recently, demographics, etc.) Telephone contact for screening and/or confirmation also follows the online methods in most cases.*

*SM is just a way to find people who MAY qualify – a screening and invitation process is still necessary.*

*An enormously valuable platform for building knowledge-based relationships in a very dynamic, real-time and comprehensive environment.*

When recruiting for in-person or telephone projects, SM recruiting is viewed as a good way to quickly raise awareness and project interest among database respondents. Field services can then cull through large numbers of people to start pinpointing the appropriate ones to call for screening.

Prospective respondents on blogs and discussion forums initially located by recruiters are generally receptive to research study invitations, participants said. Some are "upset" when first approached, feeling the field service has intruded on a private discussion, but recruiters can overcome this resistance, according to one participant:

*There is very little pushback [by potential respondents] when [we are] utilizing forums or bulletin boards. When people find out that we pay them to talk about something they are passionate about, they want to participate in our research. We have encountered some people who were upset, but if there is, we treat the situation much as we would with a respondent from a client sample who was upset because we called them over the phone.*



### **Advantages of SM Recruiting**

Reasons for using SM recruiting cited by study participants include:

- *More efficient pre-screening.* SM recruiting saves time and money for the field service by targeting people more likely to qualify for studies, participants said. This is a key reason for employing the method, not surprisingly: the less time a field service spends trying to fill a recruitment quota, the more money it makes, and the less money the client spends. By “lowering turnaround time” needed for recruiting, a field service is better “able to accommodate clients’ last-minute requests,” one participant noted. A few QRC participants use SM to do their own recruitment research on occasion by checking websites, saving themselves the costs of hiring a field service.

*[Social media] helps us narrow down our database to find exactly what we need in a cost-effective way.*

*We can move the needle faster and with less cost.*

*For professional recruits, you can pre-screen them via their profiles to make sure you are targeting the right person.*

- *For low-incidence/hard-to-find respondents.* This is another major reason participants say they use SM recruiting. Locating such people can be expensive and time-consuming; some niche groups are simply difficult, if not impossible, to discover and contact with traditional recruiting approaches. Through SM, recruiters can reach out to people involved in online support forums and other communities devoted to certain problems, interests and concerns. Examples mentioned included fans of unusual cars, art patrons and people with rare medical conditions.

*We were looking for patrons of a particular arts organization – small with less than 1,000 attendees for each run of their show. This helped us find those patrons versus “cold calling” the entire city of Chicago.*

*Those [recruits] with a very low incidence. Usually it’s certain types of patients or someone who might buy a certain hard-to-find product.*

*Access to hard-to-reach respondents who are not and may never be reachable via a standard survey, panel, etc. Find obscure professionals or, in our business, people with rare diseases.*

*We had to recruit homosexual men that used a product with a low incidence. We joined some sites that were for men seeking men so that we didn’t waste our time calling database that we weren’t sure of sexual preference. In addition, we knew these were open and willing to talk about their sexual preference. It drastically cut recruitment time and enabled us to fulfill a recruitment we may not have been able to otherwise.*

*We define those with medical conditions [based] on incidence per 100,000. We know that if it is under 100 we are going to have a real challenge and need to get creative. This is typically when we will use Facebook or other SM sites.*

Screening requirements that start out seeming to be relatively easy can end up being extremely difficult, some participants pointed out, once clients add layers of “multiple criteria” like specific demographics and product usage.

*This could be anyone. You can take a generic topic and turn it into a very low incidence recruit by adding multiple criteria. Finding a diabetic would be simple enough; finding a diabetic with a specific smartphone, age 21-29 that is using a specific blood glucose meter would make this segment almost unreachable without social media.*

*Here is a B2B example that would be somewhat typical, where you would have to meet all the [criteria]:*

- *Chief Architect/Solutions Architect for Fortune 1000 company*
- *Multiple candidates across U.S., Europe, and APAC*
- *Must have experience with software package A & B as a deployed solution within their company – assume the package is a complex piece of enterprise software (ERP, CRM, that variety)*
- *History of deployment of said package is at least x number of years (say 3 or more)*
- *Individual has a history within the given industry (manufacturing, etc.) of at least 10 years or more*
- *I could add more but you probably get the idea. With SM this type of data may merely be sitting on someone’s LinkedIn profile.*



## QRCA White Paper: Social Media Comes to Qualitative Recruitment: A Study of its Use Today

Digital influencers are another target group SM recruiting helps to locate. These people play an important role beyond their own product purchase.

*[We are] utilizing social search mechanisms via Twitter, Facebook, LinkedIn and blogs to identify influencers in the Gen Y, Gen X and Boomer segments.*

- *Growing the respondent database.* In addition to finding potential respondents on the Internet, some field services said, "we're using our Facebook page more often to get general respondents in our database."
- *Verifying respondent information.* SM sites (including blogs and public profiles) are also used to check on respondents' statements in screening, to see that people are indeed who they say they are. A great deal of information is available online, much of which is voluntarily posted and publicly available. As an example, LinkedIn was mentioned by several participants as an excellent resource for checking the work experience and positions potential respondents claim to have. (A "Vice President" may turn out to be unemployed.) This use of SM helps to reduce the number of "cheaters" in qualitative studies.

*The primary advantage (for B2B) is that you can generate a great deal of backgrounder on each interviewee. Most B2B respondents tend to keep a fairly rich set of profile information out there about their work history, projects they've led, if there are technical software tools/solutions they've implemented, etc.*

*Reliability: those in an industry forum or an illness forum, for example, are more likely to be who they say they are.*

- *Better for respondents.* SM recruiting helps to reduce the time and frustration respondents in field service databases experience, since they are screened for studies in which they are most likely to be qualified to participate. (Respondents can become discouraged by being repeatedly put through screens only to terminate.)

*The advantages are to the respondent and us. Like this [bulletin board], the timing is asynchronous; it's not as urgent and therefore a little more relaxed. Also we can be more specific in our calls to action and respondents can be more self-selecting. If, for example, they do not*

*use premium cat food x number of times per week, then they know not to call in or respond by e-mail. It's a huge time-saver for them and us! It is less of a burden on our database respondents. Respondents can get very frustrated spending 20 minutes on the phone with a recruiter and then terminate. In some cases, SM for recruiting has lessened the number of times people have to go through that, and for others, it increases the chances of spending 20 minutes on the phone and actually being eligible for the study.*

- *Better recruitment.* Because screener questions are initially asked online, one participant contended that "quality of recruiting has improved too. We're finding fewer misrecruits, in part because people are seeing questions in addition to hearing them." (Again, telephone screening/confirmation follows the online phase.)

### Issues/Pitfalls

With all its practical and quality benefits, SM recruiting also raises some serious concerns about the way it is and should be used. And, of course, this isn't yet a way to recruit everyone. "Don't forget," one participant noted, "some people (though a small number) are still not online, or more importantly, not engaged in social media."

- *Reputable sites.* Not all sites are reliably trustworthy. On the positive side, LinkedIn, Twitter, Facebook and topic-specific sites/forums are seen as quite credible since members are representing themselves and usually providing personal content. However, several participants cautioned that Craigslist, a popular site, should be avoided because it is more likely to attract deceptive people.

*We avoid Craigslist because the type of people who check the listings seem to view market research as sort of a job and they'll say whatever they think is necessary to get into the study. Even if you mask what you're looking for, I think it attracts the wrong type of people. Up until about 3 years ago we used Craigslist somewhat often, but we noticed a pattern of people not being honest and rarely ever use it now.*

- *Less efficient.* Although a number of field services credit SM recruiting with reducing recruiting work, some said that locating the right sites can demand a good deal of time.



## QRCA White Paper: Social Media Comes to Qualitative Recruitment: A Study of its Use Today

*It can be very time-consuming to find the appropriate message board to post on or users to contact – that's why we only use it when needed.*

*It is not particularly efficient – sometimes lots of investigation and back and forth required; so not fast either.*

- *Less respondent involvement.* Contacted through SM, respondents may be less committed to the research process and less likely to show up for a scheduled interview. Providing confirmations via telephone helps create project tangibility and can further encourage participation.

*[The] respondent is less likely to have a full understanding of the process and how important their participation is, so they're more likely to cancel or not show.*

*The lack of familiarity with market research can sometimes make recruiting using SM challenging. [Respondents] may not understand the importance of the research and are more likely to not participate.*

- *Quality control.* Field services' carefully developed databases provide more information and barriers to "professional respondents" than SM sites, some participants believe.

*[It's] easy for respondents to become professionals – many use multiple screen names in different areas so how easily can we really control that?*

*We use it only for very low incidence studies or for generating new respondents in general. I would say about 10% for our company. We would rather work within our own database by e-mail blasting because we have more control over who is reached and more information about the person responding.*

*I am supportive of using SM to a point, but it's important to recognize the limitations. I think it can be a great tool for reaching certain audiences via message boards and forums, or new potential respondents through our Facebook fans sharing our page with friends, but we are definitely aware that it can attract a type of respondent that we try to avoid. It's a good resource but needs to be used very carefully.*

Screening for articulate respondents who will contribute fully in the research is also difficult if recruiting is conducted through SM without a telephone follow-up, one participant observed.

*I think [recruiting for articulation] may be compromised. Many are eloquent with a pen but are either shy/reserved, uncomfortable in front of others, or ramble. This is more difficult to gauge without a conversation.*

### Should Clients Be Informed?

Participant opinions were divided on whether or not field services should ask clients for their permission to use SM in recruiting or at least inform them of its use.

- *Should inform.* Some participants feel that total transparency is necessary for a trusting, professional relationship. SM recruiting is relatively new, they say, and clients may not feel comfortable with its being employed for their projects. Interestingly, several participants, on both the QRC and field service sides, had not considered the question previously but, once the issue was raised, thought clients should probably be told.

*I weirdly sort of assumed I would be [informed if a field service is using SM]. If I were recruiting for others, I think I would pitch it as a tool, but get their permission before moving forward. I can't really explain why this is.*

*I honestly don't have strong opinions on this yet. I think it has to be used in conjunction with other tools (phone calls, etc.). Because the use of SM is so new, I would talk it over with my clients first. Some are OK being "leaders" and some are more cautious. And we need to respect that.*

*When we utilize SM for recruiting, the client always knows. Not because they require it, but because we try to inform them of what we are doing.*

- *No need.* Other participants think that client QRCs and end clients select field service firms they have confidence in, rarely inquiring in-depth about the methods of recruitment. Why should this be necessary when it comes to social media recruiting, they asked. As long as the job is done properly and the right people are recruited, clients do not need to know specifically how that was accomplished, they stated.

*I think we (the QRC and facility) are hired for our expertise. I am not sure the reason I would ask the client about recruiting methodology – they have never even asked me that question.*



## QRCA White Paper: Social Media Comes to Qualitative Recruitment: A Study of its Use Today

*Recruitment firms should be hired because they KNOW what they are doing. Trust them. Otherwise, move on.*

*It depends on the project and client, but times have evolved to a point where full disclosure is not necessary. I feel that a lot of QRCs know that recruiters use SM and unless it jeopardizes their research, they don't have a problem with it.*

Client resistance to using SM recruiting was mentioned by a few participants. They cited confidentiality reasons or a lack of understanding about the method, but also pointed out that other clients have no problem.

*I've had one client that didn't want any aspect of their research out in the public domain, even if it's masked. The reason was that it was an industry where there were only two major competitors, and they didn't want a competitor to become aware that they were doing research. That hasn't happened very often. Most of the time it's understood that if they want to interview very low incidence people, we're going to have to be creative to find them.*

*There are clients that are adamant against it. On the flip [side], there are clients that see the worth in SM and suggest it. I think the clients that are adamant against it lean towards those that don't fully understand it and are nervous about using more progressive recruiting means. They would prefer to use traditional recruiting outlets since this is what they know and are comfortable with.*

### Doing It Right

When using SM for qualitative project recruitment, participants suggested the following best practices:

- *Stick with the more reputable SM sites, avoiding ones that recruiters have found to attract people who are more likely to lie about their qualifications. As mentioned, several study participants find the public information on LinkedIn, Twitter and Facebook helpful but cautioned against recruiting through Craigslist.*
- *Use SM only as a pre-screening tool. Telephone contact is still needed for more detailed screening, to make sure respondents are articulate, and to assure respondents that the research is both legitimate and important.*

*I think the same guidelines and protocols still apply when using SM as using phone recruiting. Every respondent still needs to be screened using the client screener – SM is really more of a pre-screen. All respondents still need to be validated and confirmed by a manager as well.*

*SM should be the way to find people but not necessarily to qualify them. Qualifying procedures are still necessary.*

• *Word initial messages carefully.* Invitations and pre-screens should not reveal too much about the exact study specifications, participants warned, since this makes it easy for people to lie their way into a study. Similarly, “huckster” language should be avoided (e.g., “cash for your opinions!”). Both approaches are more likely to attract “professional” respondents. *We typically avoid giving too much away about the subject matter. We never say exactly what we're looking for; instead we indicate that if people are interested in participating, to call our office to be pre-screened, and offer a generic project subject matter. We always let them know they must speak to a company representative before we can confirm their participation.*

*There really is no one appropriate way to utilize SM. It depends on the project, but there always needs to be an element of “blindness” to SM recruiting. Can't reveal too much in a [Facebook] or Craigslist posting.*

• *Respect respondent privacy.* Crucial in all recruiting, this can be especially tricky when SM recruiting is used. It may be hard to distinguish which information found online is private versus public. Recruiters, for example, may verify respondent answers through SM sites, but they should not pass along “personally identifiable information” about respondents to clients (e.g., their names, jobs, addresses).

*I think it is critical to maintain anonymity. I think it is OK to use SM to verify a person's background but probably not OK to gather information that is outside the scope of the study. It is best to ask the participant directly vs. gathering intelligence via their postings on SM.*

*I believe respondent privacy is critical. We as an industry should employ the same measures to ensure respondent confidentiality as we do in traditional measures.*

• *Use a special non-disclosure agreement.* Confidentiality concerning the client's identity



and study information are often important in studies. There was some discussion about possibly expanding the typical qualitative research agreement. Respondents found online may have a natural inclination to share the details of their lives; as a result, it may be prudent to add provisions stating that study participants should not divulge any proprietary information in the study on blogs or online forums.

- *Follow SM proper etiquette.* Many forums and other community sites have stated and unstated rules of how to engage with one another. A research recruiter barging in can alienate members – once a rule is broken it will be difficult to rebuild rapport and attract respondents.

*In the SM space it is often good to observe and participate in conversations with others before just jumping in and saying you are recruiting for a [market research] study. It is less annoying and you get much better responses.*

- *Be transparent.* Trust is always important when conducting qualitative research, of course. In SM recruiting, recruiters should tell potential respondents as much as possible about who they are and their reasons for making the contact – they are interested in understanding community members better, without posing as one of them. At the same time, recruiters need to be careful about not revealing so much about the study that they jeopardize the research.

### **The Future**

Now part of the qualitative research landscape, SM recruiting will continue to grow, several participants said. It “just seems like the obvious path of the future,” according to one who expects use to increase a great deal.

*The ability to reach people in a more relevant, timely and effective manner is attractive and, let’s face it, profitable. As people move more of their digital profiles to the available SM space, more clients will be interested in reaching them in that environment. Field service companies will become more comfortable (so will the moderators/researchers) and incidence will rise!*

*It will continue to grow as we all get more comfortable with it and understand how to utilize it better. SM provides access to targeted respondents; therefore it is valuable for recruiting, especially low incidence [populations]. The*

*issue that could change all this are the development of privacy [regulations] that limit SM use.*

On the other side, some participants believe SM recruiting’s use may remain relatively limited. It will serve as a tool for finding low incidence respondents rather than as a routine method.

*I believe that it will grow, although by how much is difficult to answer. I think that as technology evolves, recruiters will constantly be utilizing that as a method of reaching out to people. The problem with how much it will grow is how much more people want to be connected – will SM eventually taper off because there is a need for more privacy or for more face-to-face/verbal interaction? Have we become too connected to each other? Or is it the opposite? Because SM is relatively new, it’s hard to say what the ramifications will be.*

*It works well for the rare respondent type but probably won’t be a mainstream recruiting technique in the near future because it is not as efficient as other methods. With call lists, whether phone, fax or email, you know who you need to contact and how. With social media, you can leave postings or network, but in reality you can do that with Craigslist and in many cases reach a far larger population (but deal with lots of verification issues). This is why it is typically only effective for rare populations where you don’t have many other sources.*

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### **THANKS TO STUDY PARTICIPANTS** (in alphabetical order)

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