



Current UK provision of web panels and Omnibus

Is there a need for a probability-based web panel
in the UK?



Web surveys for the general population: How, why and when?

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University of Essex, UK



Agenda

- Rationale
- Constructing the inventory
- Face-to-face omnibus surveys
- Telephone omnibus surveys
- Web omnibus surveys
- Sources

Rationale

- Accounting for UK's current provision
- History of general population surveys
 - Trend to migrate to new modes (F2F-Telephone-Web)
- Feasibility of web surveys
 - Costs, time and resources between the modes
 - Probability vs. non-probability samples
 - Online recruitment vs. conventional forms of sample selection

Constructing the inventory

- No official central list of omnibus providers in the UK
- Sources:
 - Online search (Google, Google Scholar, ESOMAR, British Polling Council, Market Research Society)
 - Telephone / email conversations with providers
 - Company websites / Rate cards
 - Specialist blogs (possibly outdated, validation required)
 - B2B
 - MRWeb
 - Not exhaustive
 - Business surveys and other niche audience / specialist omnibus not considered
 - Some secondary-source information was not confirmed

Face-to-face omnibus studies

- Since 1970's (if not earlier?)
- Probability samples
 - Postcode address file, Kish grid within household (i.e. ONS Opinions and Lifestyle survey)
 - Electoral Register
- Non-probability samples (industry standard)
 - Random location
 - Demographic quotas

Face-to-face omnibus studies

- Some companies used to do random probability and moved to quota (or ended their omnibus studies)
 - GfK (until 1997)
 - NatCen: PAF and Kish grid within household (until 2011)
 - TNS used the Electoral Roll (1980's)
- Reasons:
 - Costs, time, lack of public funding
 - Electoral Roll to PAF, poll tax and dropping out of the frame, diminishing coverage. (i.e. TNS)

UK Face-to-Face Omnibus Surveys

| Agency & Name | Sample | Reporting | Fieldwork time | Cost (per question) | Probability or quota? | Year started |
|--|---------------------------------------|---|--|--|---|----------------|
| GfK-NOP Face-to-Face | 2000/1000 UK residents 16+ | Age, gender, region, social grade | Frequency: 2-4 times a month. Duration: 10 days | Yes/no £500. Other pre-code £1,000. Open with coding £1,500 (for n=2000) | Quota (random probability until 1997) | 1970's |
| ICM Face to Face Omnibus | 1,000 or 2,000 GB 15+ | Age, gender and region. | Frequency: Weekly. Duration: 12 days | Based on length of interview. | Quota | 1989 (founded) |
| Ipsos Mori Capibus | 2,000 GB adult residents | Age, gender, region, social grade, education | Frequency: Weekly Duration: 10 days | <i>£530 per question to 1000. £957 per question to 2000 (unconfirmed)</i> | Quota | N/A |
| ONS Opinions and Lifestyle Survey | 1100 achieved sample size. | Standard demographics | Frequency: monthly. Duration: 14 weeks | Flat rate. Modules charged on a per question basis. | Probability | 1990 |
| Populus Face-to-Face | 1000/2000 GB Adults 18+ | Age, Gender, Government office region, Social grade, etc. | Frequency: Weekly. Duration: 12 days | Based on survey length | Quota | 2003 (founded) |
| TNS Face-to-Face | 2000 GB adults (16-64). 4000 (weekly) | Age, Gender, Region, Social grade, Working status | Frequency: Twice Weekly Duration: N/A | Starting at £620 for close question for sample of 2000. | Quota (random probability until 1980's. Poll Tax) | 1971 |

Telephone omnibus studies

- Innovation from F2F
 - Faster, cheaper alternative
 - Starting in the 1980's
- Representative of telephone owning households
 - Landline vs. cell phones
- Random-digit-dialing

UK Telephone Omnibus Surveys

| Agency & Name | Sample | Reporting | Fieldwork time | Cost (per question) | Year started |
|-------------------------------------|-----------------------|---|---|--|----------------|
| ComRes Telephone | 1,000 GB adults | Age, gender, region, social grade. | Frequency: Weekly. Duration: Weekend turnaround. | Starts at £450 for question with up to 4 readouts. | 2003 (founded) |
| GfK-NOP Telephone | 1000 UK residents 16+ | Age, gender, region, social grade | Frequency: Weekly. Duration: Weekend turnaround. | Yes/no £190. Other pre-code £385. Open with coding £800. Less costly if less than 50% of the sample is asked. | n/a |
| ICM Telephone Omnibus | 1,000 GB 18+ | Age, gender and region. | Frequency: Weekly. Duration: Weekend turnaround. | Starts at £200 per question. More depending on the % of sample which is able to answer the question. | 1998 |
| Ipsos Mori Telephone Omnibus | 1,000 UK adults | Age, gender, region, social grade, education | Frequency: weekly Duration: 3 – 4 days | <i>Depends on level of reporting, but a pre-coded question to 100% of sample would be £450 each. (unconfirmed)</i> | n/a |
| Populus Telephone | 1,000 GB adults 18+ | Age, Gender, Government office region, Social grade, etc. | Frequency: Weekly. Duration: 4 days. | From £220 per question | 2003 (founded) |
| TNS Telephone Omnibus | 1,000 UK adults | Age, gender and region. | Frequency: Weekly. Duration: Weekend turnaround. | n/a | 1980s |

Web omnibus surveys

- Starting in the 2000's
- Non-probability is industry standard
 - ABS recruitment (i.e. GfK-Knowledge Networks in the USA) not existent in UK?
- Recruitment
 - Online panel
 - Banners, click ads
 - Partners, third-parties

UK Web Omnibus Surveys

| Agency & Name | Sample | Reporting | Fieldwork time | Cost (per question) | Year started |
|---------------------------|-----------------------------|---|--|---|--------------|
| Aurora Omnibus | 1,000 UK adults (16+) | Age, gender, region, Social grade. | Frequency: Twice weekly. Duration: N/A | £150 per question (minimum 3 questions) | c. 2007 |
| ComRes Online | 2,000 GB adults | Age, gender, region, social grade. | Frequency: Twice weekly. Duration: 4 days. | Set up fee £100. Questions start from £295 | 2003 |
| GfK-NOP Online | 1000 UK residents (16+) | Age, sex, region | Frequency: Weekly. Duration: 24hrs available. | Yes/no £225. Other pre-code £300. Open with coding £600. Less costly if less than 50% of the sample is asked. | 2000's |
| Harris Interactive | 1000/2000 UK adults (16-64) | Age, gender, employment status, education, marital status, number of children, region | Frequency: Weekly. 10 day turnaround. | Starting at £250 per question | 1997 |
| ICD Omnibus | 1,000 UK adults | Age, Gender, ONS region. | Frequency: Weekly. Duration: 48 hours | <i>£250 per question (unconfirmed)</i> | n/a |
| ICM Online Omnibus | 2,000 18+ GB | Gender, Age, Social Grade, Working status, Region, City, Social Media Usage. | Frequency: Twice weekly. Duration: 4-5 days | Starts at £300 per question | n/a |

UK Web Omnibus Surveys (cont.)

| Agency & Name | Sample | Reporting | Fieldwork time | Cost (per question) | Year started |
|-------------------------------|--|--|---|--|----------------|
| ICM PR Shuttle Omnibus | 1,000 or 2,000 GB 18+ | Gender, Age, Social Grade, Working status, Region, City, Social Media Usage. | Frequency: Twice weekly. Duration: 4-5 days | Starts at £190 per question to 1,000 adults. | n/a |
| Ipsos Mori iOmnibus | 1,000 GB (16-64). Other samples available. | Age, Gender, Region, Social grade, Education. Ages 16-64. | Frequency: Weekly. Duration: weekend turnaround. | <i>£330 per question, minimum of 4 questions. Images £50. Video £100. SPSS £100. (unconfirmed)</i> | n/a |
| OnePoll Omnibus | 1000/2000 UK adults | Age, gender, city, region. | Frequency: N/A Duration: weekend turnaround. | £150 to join. Starting £150 for 1 question for sample of 1000 or £200 for 2000. | 2003 (founded) |
| Opinium | 2000 UK adults | Age, gender, social grade, working status and regional breakdowns. | Duration: 48 hours Frequency: Daily | £250 a question for the first ten. Then £200 per subsequent question. | 2007 (founded) |
| Populus PR Express | 1000/2000 GB Adults 18+ | Age, Gender, Government office region, Social grade, etc. | Frequency: Twice weekly. Duration: 4 days | 1,000 = £190 per question 2,000 = £250 per question | 2003 (founded) |
| Populus Online | 2,000 GB adults 18+ | Age, Gender, Government office region, Social grade, etc. | Frequency: Twice weekly. Duration: 4 days | £295 per question | 2003 (founded) |

UK Web Omnibus Surveys (cont.)

| Agency & Name | Sample | Reporting | Fieldwork time | Cost (per question) | Year started |
|------------------------------|----------------------------|---|---|--|--------------|
| Research Now Omnitaxi | 500/1000/2000 | Age, gender, region | AdHoc Frequency: Unclear, perhaps daily. Duration: unclear, perhaps daily | N/A | n/a |
| TNS OnlineBus | 1,000 UK adults (16-64) | Age, Gender, Region, Social grade, Working status | Frequency: Twice weekly. Duration: 2-3 days | £270 per question with 1 to 5 pre-codes | c. 2002 |
| YouGov | 1000/2,000 UK adults (18+) | Age, Gender, Region, Social grade, Working status, Marital status, etc. | Frequency: Daily. Duration: 48 hours. 24 hr available. | Set up fee £200. £300 per standard question. £325 for open-ended question. (for 48 hours, 2000 sample size). | 2003 |

Sources

Company websites / rate cards:

- Aurora
- ComRes
- GfK-NOP
- Harris Interactive
- ICD
- ICM
- Ipsos-MORI
- NatCen
- Office for National Statistics
- OnePoll
- Opinium
- Populus
- Research Now
- TNS
- YouGov

Email, telephone conversations:

- Anita Emery (TNS)
- Gerry Nicolaas & Alun Humphreys (NatCen)
- Matthew Beach (ONS)
- Nick Moon (GfK-NOP)
- Patten Smith (Ipsos-MORI)
- Peter Lynn (ISER)
- Tom Lobban (Aurora)

Specialist blogs and professional organizations:

- Market Research Web Blog. URL: <http://www.mrweb.com>
- B2B PR Blog. URL: <http://b2bprblog.com/>
- ESOMAR. URL: <http://www.esomar.org/>
- British Polling Council. URL: <http://www.britishpollingcouncil.org>
- The Market Research Society. URL: <https://www.mrs.org.uk/>

Thank you