



HOW TO FIND PARTICIPANTS

 TERAPAGE

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Ready or not... Here we go!

You are all set to dive into an online qualitative study, but one crucial question remains: where will you find your participants?

This brief guide introduces some common participant sourcing options, exploring their pros and cons and suggesting when each may be most effective. Specifically, we'll cover:

- Using internal lists (customers, employees, etc.)
- Recruiting through social networks
- Sourcing from online participants
- Partnering with a specialized qualitative recruiter

Additionally, we outline four essential questions to consider:

1. How easily can this group be reached and retained?
2. What level of commitment are you asking for?
3. What incentives are you offering for participation?
4. What is the ideal reward for engagement?

Sourcing from Existing Lists

Your existing customer or employee list is a valuable starting point for participant recruitment. Using a familiar audience, such as prior customers, is a natural fit for studies focused on customer-driven insights. This approach saves costs and fosters a sense of mutual value within your community.

Upload your list to Terapage, including any segmenting data you may have. From there, you can send targeted invitations directly through the platform or, if using external email software, bulk-generate login credentials for distribution or provide a login link for easy access. Keep in mind that shared links may be circulated beyond your target audience, so consider this if control is a priority.

With email recruitment, note that conversion rates tend to be low (around 1-2%), so ensure your list size aligns with your participation needs. If initial engagement falls short, consider supplementing with an additional recruitment method.

Incentives are particularly important here. For longer-term studies, outline how and when rewards will be distributed. Also, remember that participants from your internal lists likely have a connection to your organization. Clarify any anonymity settings, as transparency may help build trust and encourage honest responses.

Social Networks

If your budget is limited or you are aiming to enhance other recruitment efforts, tapping into your social network is another effective option. Like internal lists, this method requires access to a substantial audience that aligns with your ideal participant profile.

This method is cost-effective and can also help build a reciprocal relationship with your audience. However, inviting a general audience does come with some risk, as it may attract participants who aren't the best fit or are only interested in incentives. Consider sharing a link that directs potential participants to your site, where they can learn more and join.

Expect conversion rates from social networks to be even lower than from lists, so emphasize the benefits of participation in your messaging. Highlight the unique opportunity and incentives for taking part, whether it's monetary compensation, brand influence, or other value.

To control for unqualified participants, Terapage offers tools for screening and participant verification. However, make sure to set realistic expectations based on your network reach. This approach is often best as a supplementary recruitment method, although large consumer brands with broad audiences may be able to use it as a primary sourcing method.

Online Participants

For most Terapage communities, online participants are a primary recruitment source. Participants are sourced from online databases through a quick screening survey, which filters candidates according to your specific demographic and behavioral criteria.

Qualified individuals are then introduced to the study details (e.g., duration, engagement requirements, incentives) and asked if they're interested in participating. Participants who agree can either be automatically added to the community or documented for a later invitation—a common practice in most cases.

Participants recruiters often request an Incidence Rate (IR) estimate, indicating the percentage of the population that meets your criteria. While they can estimate IR for standard demographics, you may need to provide guidance for more specific requirements (e.g., the prevalence of users of a specific brand in a certain region).

If your community is small and qualitative, check that your provider doesn't have study minimums. For long-term participants, confirm that the recruiter is open to longer-term engagement, as some prefer shorter study timelines.

Recruiting Agency - Qualitative or Specialized Recruiter

When targeting a highly specific or hard-to-reach audience, or when standard participants recruitment may not deliver the quality or specificity you need, a qualitative recruiter is often the most viable solution.

Qualitative and specialty recruiters draw from various sources, including participants databases, but take additional steps to verify participant quality and authenticity. Beyond an initial online screening survey, these recruiters may require candidates to complete identity verification tasks, such as webcam uploads or phone interviews to discuss the research topic.

These agencies frequently provide participants and incentive management as well. For an added fee, this service can help sustain participant engagement throughout the study, easing the workload on community moderators.

This option is the costliest, typically starting at around \$50 per participant (and often exceeding \$100 per participant), not including additional fees for incentives and management.

Essential Things to Consider



How accessible is this audience (and how likely are they to stay engaged)?

Your recruitment approach will vary based on your proximity to the target audience. For instance, if a client wants to engage employees, they may already have a contact list. However, recruiting specialized groups, like family doctors, may require working with an agency that focuses on healthcare professionals.

This question is often the most critical in guiding your choice of recruitment source. Begin by outlining the profile of your ideal community participant, detailing demographic and behavioural preferences along with desired representation (e.g., age range, income bracket, brand preferences, usage of Product Y vs. Product Z, etc.).

What level of commitment are you asking from participants?

Consider the total study duration in terms of the time commitment required on a daily, weekly, or monthly basis (e.g., 30 minutes per week over six months). Clearly communicate this upfront so participants know what to expect before committing. This also informs your response to the next question, “What will participants receive in return for their involvement?”

If working with a recruiting agency, note that extended study durations may require special rates or different arrangements.

What will participants receive for their engagement?

Be sure to communicate incentive details along with participation expectations. While incentives are often cash-equivalents like gift cards, alternatives may include product samples, industry insights, or the opportunity to support a cause they care about, depending on your relationship with the audience and recruitment source.

Offering a variety of incentives can be particularly useful for longer-term communities, where ongoing engagement is crucial, and a broader array of rewards may better meet diverse preferences.

If providing a monetary incentive, consider it on an hourly basis to help structure a fair compensation model. This approach will assist in shaping your methodology and in creating a balanced schedule for engagement and incentives, leading to better participation and data quality.

Determining an Appropriate Incentive Amount



For monetary incentives, excluding prize-based or non-monetary rewards, compensation typically falls between \$10 and \$50 per hour of participant effort.

For instance, a one-week community requiring participants to complete three 30-minute activities and engage for about an hour in discussions with moderators might be compensated with a \$150 Amazon gift card. Virtual gift cards can be quickly distributed using services like Tango Card or Virtual Incentives. Additionally, some recruiters, especially those with participants services, may handle the incentive distribution themselves or offer proprietary reward options that participants are required to use.

Terapage Tools to Support Recruitment



Terapage offers a robust suite of features to streamline the recruitment, onboarding, and management of study participants.

Segment and Profile Fields

Store key participant information, whether from internal lists or gathered during recruitment, for easy use in study design and analysis.

Ideal for: All recruitment sources

Advanced Filtering

Manage participant groups within Terapage using filtering and targeting capabilities, enabling in-platform participants management and eliminating the need for third-party tools.

Ideal for: Traditional participants, internal lists, and social media

Bulk Uploading

Quickly import participant data from any external source directly into Terapage.

Ideal for: Traditional participants, qualitative recruiters, internal lists

SSO and Webhooks

Seamlessly transfer participants from external systems into Terapage without requiring a sign-in. This feature also allows participants recruiters to confirm successful onboarding with a completion signal.

Ideal for: Traditional participants

Automatic Participant Screening Process

Use screening surveys to gather segment-specific data and manage participant access to specific communities.

Ideal for: Internal lists and social media

Shareable Links

Provide participants with an onboarding link directing them to complete a screening survey or registration process.

Ideal for: Internal lists and social media

Participation reports and data



Reports and Summaries

Effortlessly monitor participation rates and track task completion, allowing you to identify less active members and recognize highly engaged participants.

Ideal for: All participant recruitment sources

Gamification

Encourage participant engagement by awarding points and levels for contributions. Design a tiered incentive structure to balance rewards with participant involvement effectively.

Ideal for: All participant recruitment sources

Relevant links

- Recruitment Calculator: <https://terapage.ai/recruitmentcalculator.html>
- Incentive Calculator: <https://terapage.ai/incentivecalculator.html>

Getting in touch with us

Terapage help firms understand the trends and insights that matter to them, in the ways that matter to their respondents. We believe that great things happen when people really understand each other. That is why we offer an innovative way to research human needs, their behaviours, journeys, and personal experiences. Understand the humans behind the pie charts, the sentiments behind the analytics, the why behind the what, who, when and where. We help you experience what they feel at work, online, at home, and in store in a way that's not just innovative, but real, raw, rich, and very human.

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