



# OPERATIONAL GUIDELINES FOR RESEARCH PARTICIPANT INCENTIVES

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# About the Global Data Quality Initiative

The Mission of the Global Data Quality (GDQ) as a collaborative profession, is to build confidence in the data we collect and deliver through data quality guidance and standards that enhance the value of research.

This is achieved via the following outcomes:

- The language of quality - how we refer to the different aspects of fraud, duplicates, and survey cleaning in ways that inform with accuracy and transparency
- Fraud detection – tracking the prevalence of fraudulent survey completions by humans or bots and outlining best fraud detection and mitigation practices
- Identification and mitigation of bias from sample frame and representativeness
- Data quality in research surveys, and the resulting impact on overall quality of the data
- Improvement in the research participant experience

For more information about GDQ see: [www.globaldataquality.com](http://www.globaldataquality.com)

## Acknowledgments:

GDQ would like to thank Frank Kelly from Virtual Incentives and Shifra Cook from Ayda, who produced this guidance on behalf of GDQ, drawing from their experiences of delivering successful incentive management approaches.



## Introduction

This guideline was designed as a companion to the comprehensive ethical incentive guidance produced by GDQ partner, The Research Society (TRS).

This guidance includes practical operational considerations for administering a research participant incentive program as relevant for research agencies, clients, and fieldwork teams globally. A good incentive strategy should be fair, clear, simple, and valuable, enhancing participants' experience while ensuring they receive their rewards. The primary goal is to deliver value to the research participant while minimizing complexity, point value obfuscation, non-redemption and lost redemption value.

## What is an incentive in the context of market and social research?

In the context of market and social research, an incentive refers to a reward or compensation offered to participants in order to encourage their participation in a study or survey.

**These incentives can take various forms:**



**Monetary Incentives:** These are direct financial rewards given to participants to motivate thoughtful participation. In some cases, the rewards are in the form of points which can be redeemed for cash payments, gift cards, or vouchers.



**Non-Monetary Incentives:** These rewards are not financial but still offer value to participants. Examples include merchandise, discounts on products or services, access to exclusive content, or even recognition (such as a badge or certificate of participation). Non-monetary incentives are prohibited in certain types of research due to concerns over biasing the results.



**Prize Draws:** In this case, participants are entered into a lottery or raffle for a chance to win a prize.



**Charitable Donations:** Contribution to a non-profit organisation appeals to those who favour altruistic rewards. This can also support corporate social responsibility efforts, aligning participant preferences with broader ethical initiatives.

Each type of incentive has its own advantages and can be chosen based on the target audience and research goals. Care should be taken to ensure that the reward is motivating but does not bias the research in any way, e.g. only offering a reward that appeals to a narrow slice of the population. It should also be noted that incentives are given to motivate and reward participation in market and social research studies and are not to be positioned as pay since research participants are not employees.

# Incentives play a crucial role in enhancing various aspects of the research process. Here are the key sections related to the benefits of using incentives:

## FASTER RECRUITMENT

Incentives can significantly speed up the recruitment process. There is a trade-off between the cost of the participant incentives versus the cost of recruitment labour such as telephone interviewers, the optimal incentive is typically considered the amount that minimizes the total cost of recruitment.

## EFFICIENT DATA COLLECTION

Incentives that are motivating are more likely to encourage participation among research subjects. Many studies have shown for example that offering points or cash-like incentives lead to at least a 50% higher response rate among participants. On multi-stage research projects such as an in-home use test, bonus or accelerated incentives for each stage are used to ensure research participants complete the process.

## HIGHER COMPLETION RATES

Incentives can improve the completion rates of surveys and studies.

## RETENTION IN LONGITUDINAL STUDIES

The use of incentives in longitudinal studies, which involve repeated observations of the same subjects over a period of time, can encourage participants to remain engaged.

## REWARDS FOR TIME AND EFFORT

Incentives serve to motivate participants' to thoughtfully engage in the research process. This is especially important in studies that require a significant time commitment or involve complex tasks.

## USE OF NON-LABOUR LANGUAGE

Clear language should be used to describe incentives. Incentives are not "payments" for work, instead they are "thank you gifts" or "tokens of appreciation" in recognition of participants agreeing to take part in research and using this type of terminology can create a more positive perception. This approach can help avoid any implications of a formal work relationship and emphasize the voluntary nature of participation.

# Rewarding research participants involves ethical considerations to ensure that the process is fair, transparent, and respectful of the participants' rights and well-being. Here are some key ethical considerations:

## INFORMED CONSENT

Participants should be fully informed about the nature of a research study, including the incentives offered, before they agree to participate.

## EQUITY AND FAIRNESS

Incentives should be distributed equitably among all participants. All participants performing the same tasks should receive similar rewards.

## TRANSPARENCY

Researchers should clearly communicate the nature, value, and timing of the incentives to the participants. Transparency helps build trust and ensures that participants are fully aware of what they will receive and when they will receive it.

### Immediate vs. Delayed Fulfilment:

- Immediate fulfilment is generally preferred, providing instant gratification and reinforcing positive engagement.

### Clarity and Transparency:

- Clear communication about how and when incentives will be delivered is crucial.
  - Participants appreciate knowing the exact amount they will receive and any conditions that must be met to qualify for the incentive.

## CONFIDENTIALITY

The process of rewarding participants should protect their privacy and confidentiality. Researchers must ensure that personal information collected for the purpose of distributing incentives is securely stored and only used for administering incentives and for no other purpose.

### Reputation of the Research Entity:

- Trust in the research panel, agency or provider significantly impacts willingness to participate.

### Privacy and Data Security

- Assurance that personal data will be kept secure and used ethically can influence participation.

## APPROPRIATENESS OF INCENTIVES

Every effort should be made to offer incentive options that are relevant to the full group of participants to avoid bias in the sample, and also recognise the type of participants involved e.g., suitable incentives should be provided to children who are participants.

### Effort vs. Reward Balance

- Participants evaluate whether the effort required (time, personal data sharing, travel) is worth the reward offered.

### Comparison with Alternatives

- Participants often compare the incentives offered by different research opportunities.

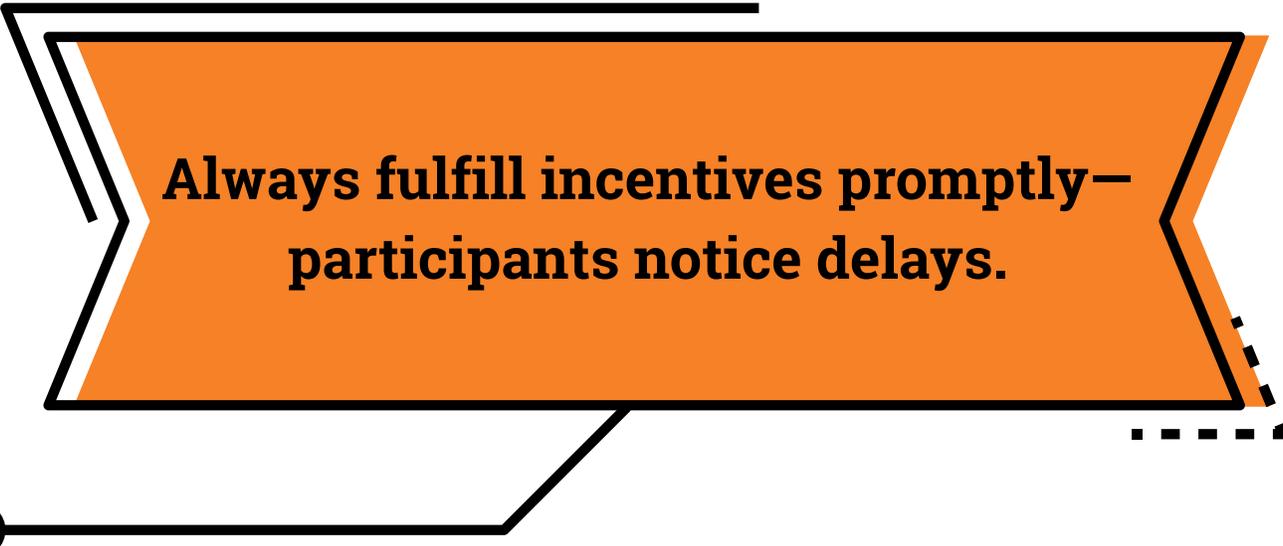
## ETHICAL REVIEW AND APPROVAL

The use of incentives for political, academic and opinion research are typically guided by an ethical code or in some countries by an institutional review board (IRB). This oversight ensures that the incentives avoid introducing bias to the research and adheres to established ethical guidelines and standards.

## LEGAL AND REGULATORY COMPLIANCE

Researchers must comply with legal and regulatory requirements related to rewarding participants. This includes understanding and adhering to tax laws, gambling/gaming laws (if free prize draws are offered as incentives) and any regulations specific to the region or country where the research is conducted.

By carefully considering these ethical and legal aspects, researchers can design incentive strategies that respect participants' rights, promote fairness, and uphold the integrity of the research process.



**Always fulfill incentives promptly –  
participants notice delays.**

# When rewarding research participation, how is panel incentivisation different from project incentivisation?

When incentivising panels or project participants there are two key differences: the nature of participant engagement and the operational model.

## KEY DIFFERENCES

- **Engagement Frequency:**
  - Panels: Provide regular participation opportunities with consistent incentives.
  - Projects: Offer irregular, specific opportunities with varying incentives.
- **Incentive Models**
  - Panels: Standardised points or reward system, creating a predictable incentive structure.
  - Projects: Implement diverse incentive models tailored to individual project needs.
- **Participant Expectation**
  - Panels: Participants expect continuous engagement and regular rewards.
  - Projects: Participants engage on an as-needed basis, driven by the requirements of each unique study.
- **Operational Flexibility**
  - Panels: Participants expect continuous engagement and regular rewards.
  - Projects: Participants engage on an as-needed basis, driven by the requirements of each unique study.

## PROJECTS:

Have greater flexibility in designing incentive schemes to match the specific demands of individual projects, allowing for a more customised approach. In summary, since panels have a lot of historical data, they can predict how participants will respond to various levels and types of incentives. On a project level, there are many more unknowns and therefore testing different incentive offers and values is often the best way to optimize the project recruitment and completion levels.



# Context: Incentives from a participant experience perspective

From a research participant's perspective, incentive payments are crucial motivators that influence their decision to take part.

## MOTIVATION AND EXPECTATIONS



### Primary Motivation:

- **Monetary Incentives:** Many participants are primarily motivated by financial rewards.
- **Non-Monetary Benefits:** Some participants appreciate non-cash rewards such as gift cards, product samples, or discounts on products/services.

### Expectation of a Fair Reward Structure:

- Participants expect that their time, effort, and provision of personal data are fairly rewarded. The perceived fairness can affect their willingness to participate and the quality of their engagement.



## IMPACT ON PARTICIPATION QUALITY

### Enhanced Engagement:

- Fair and attractive incentives can lead to higher quality participation, as participants feel valued and motivated. In each of six studies undertaken in 2024 in the US, UK, France and Germany, when respondents were asked how to improve the participant experience, providing higher rewards was the top answer.
- Conversely, inadequate incentives may result in disengaged or dishonest responses, compromising the study's data quality.

### Repeat Participation:

- Positive experiences with incentive rewards can encourage repeat participation, benefiting longitudinal studies and research panels seeking consistent engagement.

# Incentive Policy Recommendations and Best Practice

The following policy recommendations and best practices are designed to ensure a sustainable and mutually beneficial relationship with research participants.

**Prompt Fulfilment:** Research has shown that one of the key priorities for participants is that incentive awards are made in a timely manner, ensuring that they do not have to wait once their participation is complete.

**Incentive Expiration:** Once an incentive has been redeemed for a voucher or gift certificate, a countdown starts that will determine the expiration of that incentive award. The expiration period of an incentive should not be less than 3 months.

**No Payment:** Redemption of an award should not require any payment on the part of the recipient.

**Charitable Donations:** Donations to charities should be only made to organizations that are legally recognized as charitable organizations. The amount to be donated should be clearly stated and information about the charity should be readily available.

**Unnecessary Complexity:** Incentive offers should have the goal that the incentive value gets properly delivered and realized by the research participant.

**Value of Personal Data:** The level of friction/intrusiveness required by the research activity should be correlated to the amount of the incentive offered.

**Tax Reporting:** Every effort should be made to comply with local tax laws.

**Transaction Fees:** If a transaction fee is to be charged as part of the redemption process, those fees should be clearly stated and those fees should not include any profit margin for the research company.

**Responsible Party:** If a research participant has trouble redeeming an incentive offer, the research panel, agency or provider may refer the participant to a support team from the incentive supplier, but the onus is on the company to make sure that the problem is resolved.

**Incentive Offer:** The offer should be non-biasing: no merchandise related to the brand for which research is being done should be offered as an incentive to participate.

**Offer Best Practices:** Any limits to the way in which an incentive offer can be used should be clearly stated. For example, if a virtual Visa Card can only be used for online purchases, that limitation should be clearly stated.

**Data Privacy:** Consent must be obtained before any personal data is transferred to a third party during the award redemption process.



**Fulfill incentives within days of completion.**



**Keep expiration at least 3 months.**



**Avoid making participants pay anything to redeem.**

### **For Panels**

**Point Expiration:** Companies should clearly define in their terms and conditions the circumstances by which points will expire or become invalid. If points are to expire due to inactivity, the inactivity period should be no less than six months.

**Crediting of Points:** In most cases, points should be credited to a research participant's account in real-time, but in many cases quality reviews and other logistics might delay that process. In all cases, points should be credited within the timeframe indicated in their terms and conditions unless stated otherwise in advance of the research activity.

**Minimum Redemption Value:** The activity required to “cash out” on an incentive should not be set such that a large percent of the research participants never reach the minimum value either through a lack of opportunity or diminished interest in research collaboration.

**Points Balance:** The balance of points in a participants account should be readily accessible such that there is clarity about earnings for research activity.

**Missing Points:** A process should be available for research participants to challenge the panel company regarding any points they feel are missing or were not properly credited to their account. Inquiries should be handled within the time frame indicated on the terms and conditions.

**Points Value:** The value of points should be easily calculated into a value in the local currency or a widely used reference currency.

## **For Projects**

**Prize Draws or Sweepstakes:** Entry to these draws must be free. Many jurisdictions regulate how draws should be administered. The process of selection should be explained in the rules and participants should be informed about the number of entries that they have been given. High level details on winners should be made available.

## **Fraud Mitigation**

**Incentive Fraud:** Reasonable safeguards should be put in place to ensure that redemptions are being done by legitimate research participants. Checks and reporting should be in place to review redemption activity for unusual patterns such as a high volume of redemptions from a single account or other suspicious activity.

**Recompense for Fraud:** If a person's incentive points or awards are stolen as part of a fraud scheme perpetrated against a company and incentive value is lost through no fault of the research participant, then those incentive values should be reimbursed to the research participant for the value of the stolen incentive.

**Many-to-one Account Sweeping:** If a person's incentive points or awards are stolen as part of a fraud scheme perpetrated against an individual, and incentive value is lost through no fault of the research participant, the incentive values should be reimbursed to the research participant for the value of the stolen incentive.