tap research

Quickstart Guide:
DYI Sample Tool

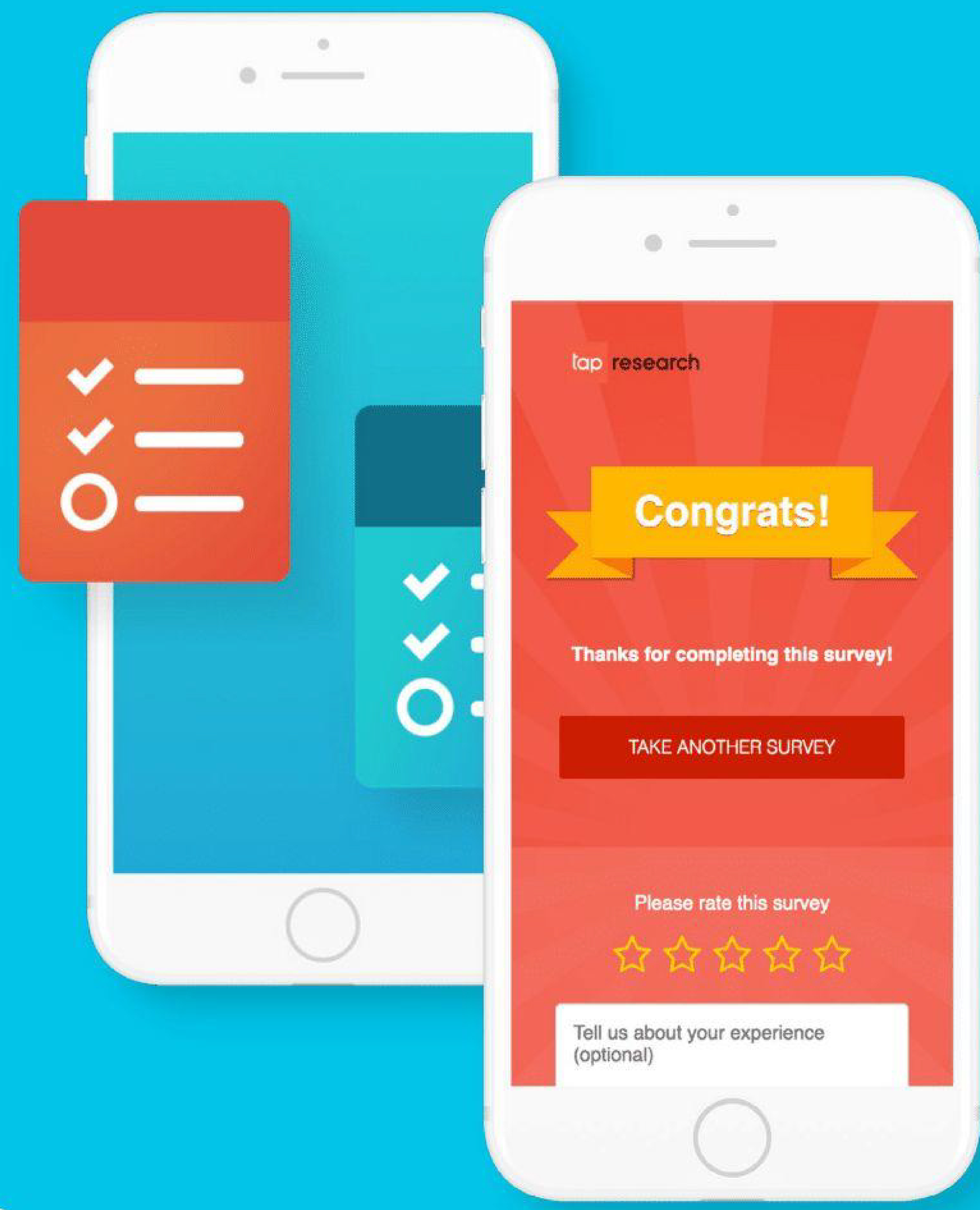


Table of contents

TapResearch

TapResearch was started as a new approach to collecting high quality, representative data that is best suited to today's culture, technology and human behavior. In order to achieve this, TapResearch sought to maximize how many people it could reach.

We embedded our survey experience into mobile apps because this is where people spend their time. In 2019, time spent on mobile surpassed TV for the place where Americans spend the most time, nearly 3 hours per day on average. Of that time, an astounding 90% of it is spent within apps.*

Reaching a Large, Diverse Audience

By reaching respondents through the mobile apps they are already using everyday, we are able to reach a large and diverse audience of people who cannot be reached through other methods (i.e. they are unlikely to sign up to take surveys with an online panel provider or answer the phone to answer a questionnaire). The vast majority of our respondents do not take market research surveys through any panel providers - and more than 3 million people take our surveys every month. And as we continue to scale our network we will access more and more of the world's 5+ Billion mobile users, and deliver increasingly representative sample for our customers.

* source: eMarketer

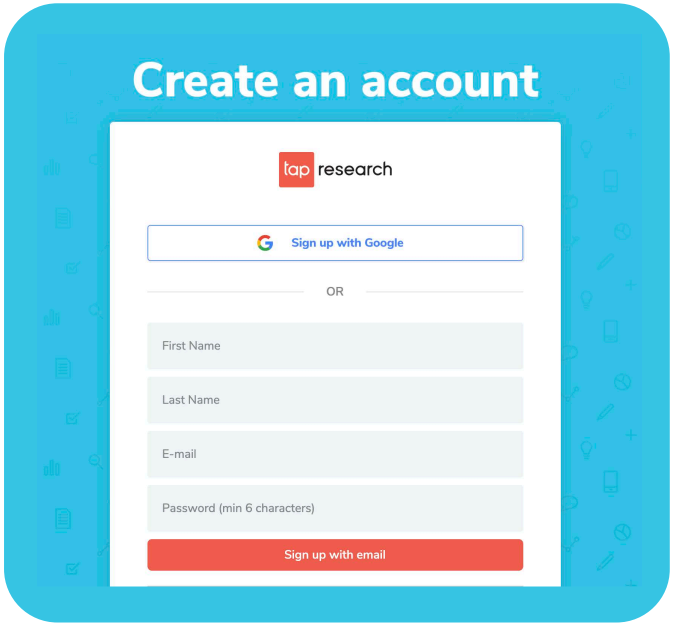
Create your Account

There are two ways to set up an account with us:

1. You can reach out to projectmanagement@tapresearch.com, and we will be happy to create an account for you.

or

2. You can follow this link and create an account on your own.



Create your Project

1

When you log into your account, you will see the + New project button in the top right corner of the screen. In the box to the left of this, you can search for your project by name or ID after it is created.

2

Next, you will be prompted to the screen where you can name your project, select Country, and the Language. We have feasibility in 25 countries, so there are many options in selecting the population you would like to reach.

The country language is selected as you start building your project:

3

Our projects are created at the language level. If you have a project running in multiple countries or need multiple languages in one country, you will need to create one project for each country and each language.

Note: this can easily be done by cloning the first project and changing the country or language.

Our targeting capabilities are different in each country. While so things such as age and gender are universal, household income ranges, for example, are different in every country.

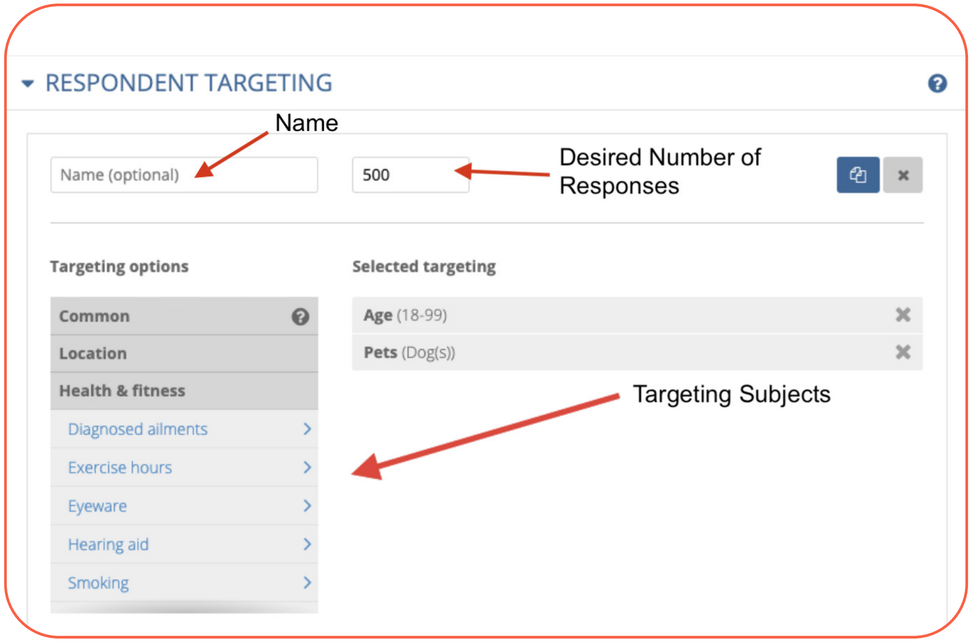
Once the project is created you will see that our campaign builder has 6 sections.

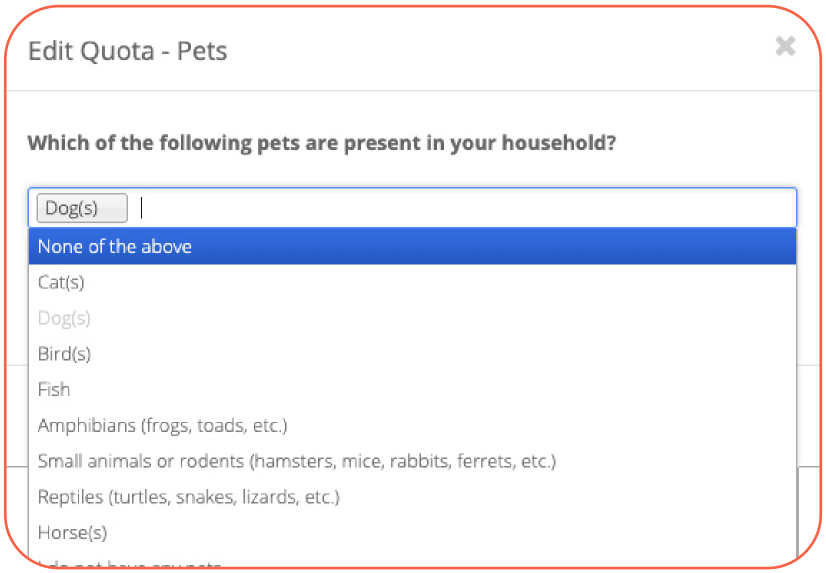
Respondent Targeting

In the Respondent Targeting section, you can target your desired population by building out groupings.

- First, name your group and choose how many respondents you need.
- Next, you can add targeting options on the left side to define your audience.
- Keep in mind that at least one targeting option is required (e.g. ages 18-99).

Our targeting options are categorized under subjects. Simply click the categories to expand or collapse the lists.





When you select a characteristic, you will see a pop-up with the actual question wording and the answer options.

In this example, we're selecting dog owners.

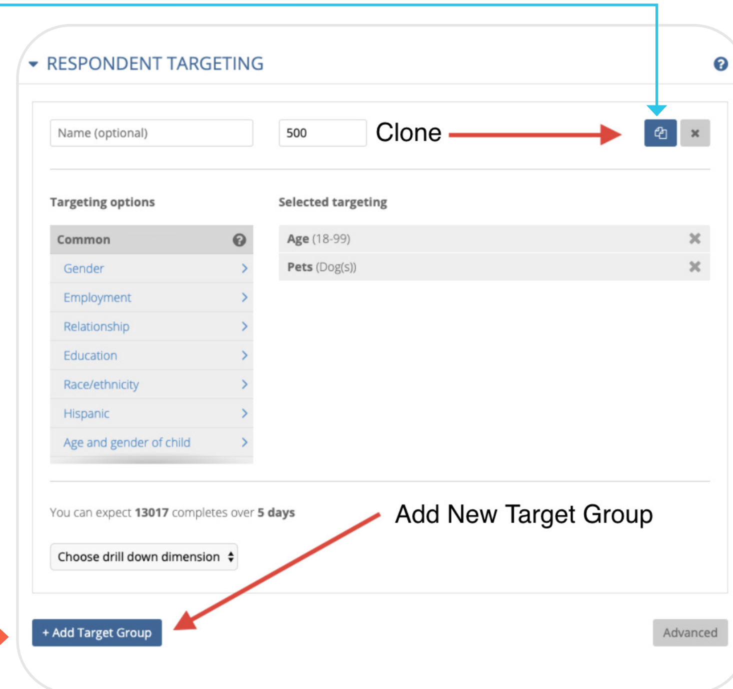
Respondent Targeting

Oftentimes, projects require more than one target groups. If you have multiple groups you'd like to target or if you'd like to manage quotas, you can add more target groups.

This can be done in two ways:

Click the Clone button in the top right-hand corner.
This will copy your current target and you can change what you need. This is helpful if you have a large amount of requirements that you don't want to re-enter.

Click the +Add target group.
This will create a second blank target group.



We have two main profilers respondents fill out when they join our audience:

Core Profiler: These attributes are available for all TapResearch respondents	Age, Gender, Date of Birth, Employment Status, Postal Code, Military Status, Ethnicity (US only), Race (US only), Household Income, Marital Status, Auto Ownership Status, Parental Status, Education Level, Sole-Adult in Household?, Country State (US) / NUTS I Region County (US) / NUTS II Region DMA (US only) MSA (US only) CSA (US only) Division / Region (US only) Metro Type (US only), Device Type, Device Platform
Extended Profiler: These attributes are available for respondents that have undergone additional profiling. Only applies to US, CA, FR, DE, AU and GB	Hobbies & Interests, Pet Ownership, Age & Gender of Children, Total Household Members, Housing Type, Household Industries, Employment Industry, Household Decision Maker, Company Department, Job Title or Level of Responsibility, Number of Employees, Company Revenue, Business Decision-Maker, Auto Model Year, Auto Type, Auto Brand (Make), Voter Registration Status, Political Affiliation, Sexual Orientation Substance Use, Medical Conditions

Respondent Targeting

Advanced Functionalities within Respondent Targeting

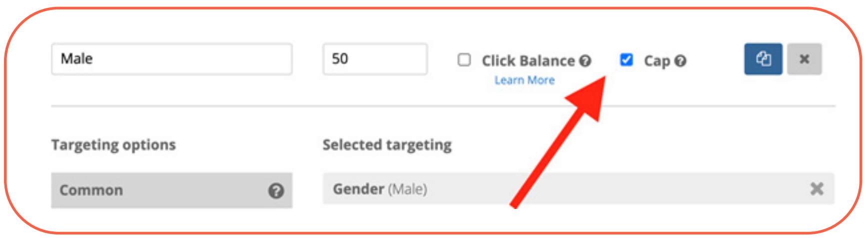
Caps:

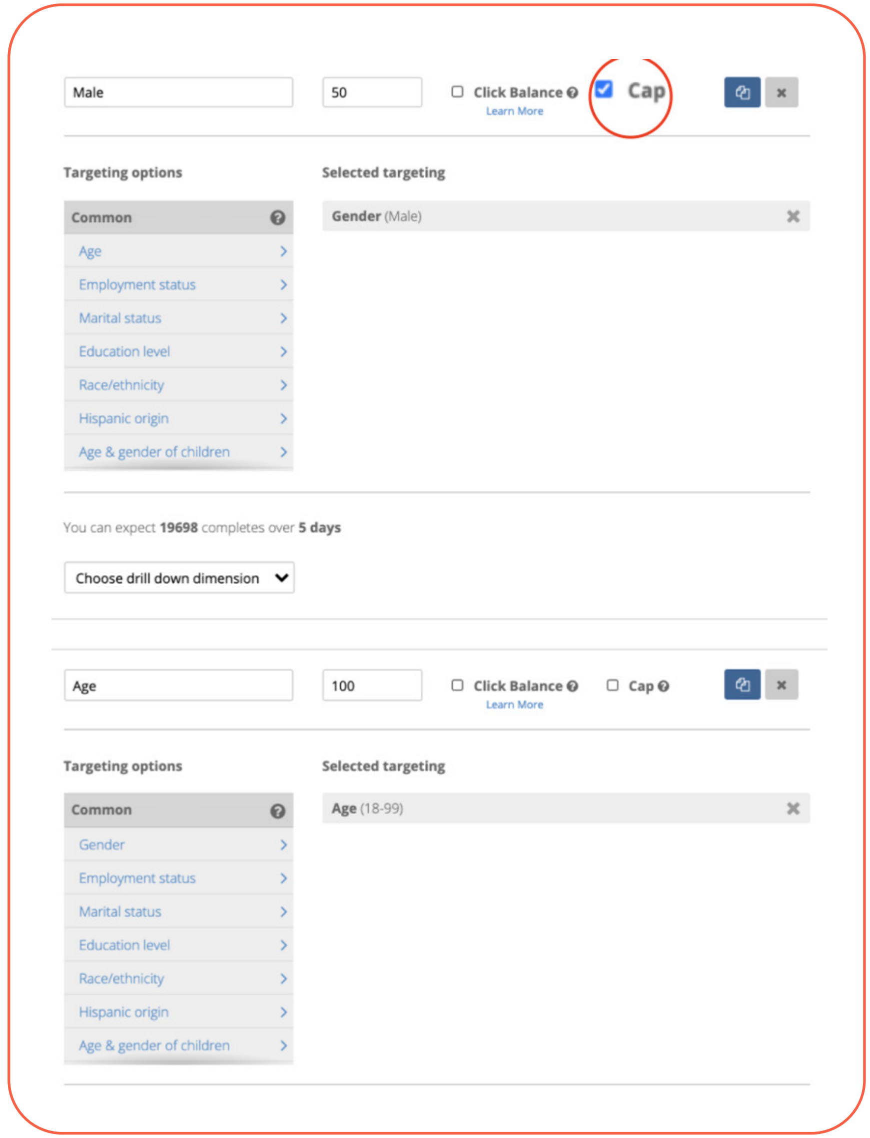
Want more options when managing quotas? Using our Cap functionality can help you nest quotas more efficiently.

By checking "cap" for a quota, you are applying that quota to all the quotas in the project indicating that a max number of completes of a certain demographic is allowed. Once you check "cap" you will see that quota disappear from the feasibility estimate that is because it's being applied to the other groups.

Capping doesn't work as a normal target group in our system. It puts a limit on how many completes the whole project can get from that certain population.

In the example below, we have age as a regular target group, but we are capping males at 50. That means we'll stop collecting males for the project at 50n and the rest of the project can only be females. Hence, it's called "Cap" because you are capping the males allowed into the project.





Keep in mind that a cap will not ensure that the amount is reached. It's possible that this project would collect 40 males and 60 females. The cap just ensures we don't go over that amount.

Note: At least one quota in a project must not be capped. Why? Because you need one regular target group to have the caps apply to!

Respondent Targeting

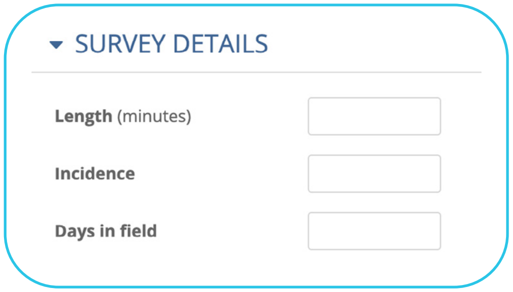
Advanced Functionalities within Respondent Targeting

Census balance:
You can click the census balance button when adding age or gender and we will ensure that the respondents fall in all age / gender ranges, inline with country census information. (This option is only available for US populations).

Side note: Census balancing will slow down projects.

Drill downs:
This will allow you to see the feasibility breakdown for various targeted populations. In the below example, we see the estimation of populations of dog owners broken out by political affiliation.

Survey Details



In the **survey details section** you will want to add the surveys expected length (minutes), incidence rate, and days in field. Incidence Rate, or IR, is the estimated percent of respondents you expect to be able to complete the survey after you have targeted for all available characteristics.

After putting in survey details to get a feasibility estimate you will have to insert a price on the right side!

We have a **'pick your own price'** model. This means you can select the price you need depending on your timeline, target population, and survey specifications.

Our system will estimate the amount of people we can reach after you've put in your project details and price. You can adjust the price up and down and our system will tell you how many responses it expects, so you can pick the right price for you.

For example:
Let's say you are wanting to survey people who have dogs. This is an easy population to reach so you could most likely pick a lower price. However, if you also need the responses to be from older and high income respondents, then you may want to pick a higher price to get the needed responses.

After inserting price you will see **feasibility populated**, which is calculated based on the survey details you enter into the system. If the details change so will our feasibility.

Note: Our feasibility is based on the last 14 days of respondents who were active in our network.

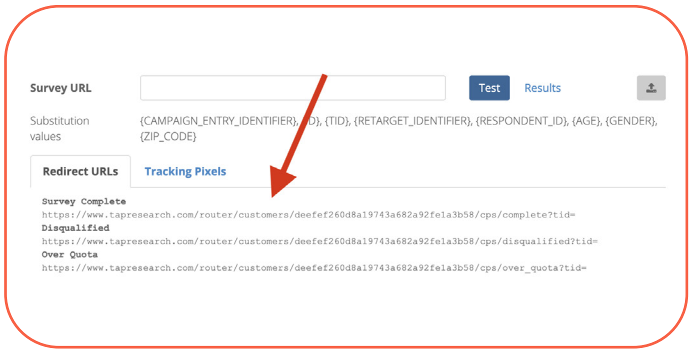
URLs

Testing you project

First, The URL you use will need to be set up to capture an ID parameter from Tap. This ID will identify the person taking your survey and can later be used to match demographic information. All you will need to do is append a custom variable to your URL.

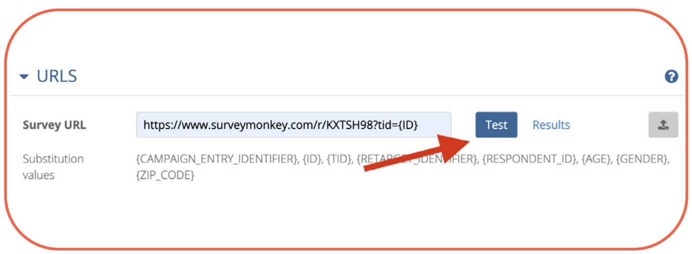
In this example, we want the ID parameter to be added at the end of the link. By using the {ID} variable the TapResearch system will automatically add in the respondent's ID to the URL.

You can also gather some of our data on the respondent using the {AGE}, {GENDER}, {ZIP_CODE} and {RESPONDENT_ID} substitution values in your URL. If you don't wish to append these to the URL, then you can also download the demographic information afterwards.



Next, you will want to put your redirects in place within your survey builder. The redirects can be found here:

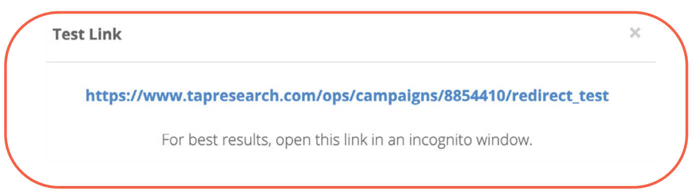
Note: The redirects are company based not projects based so you can save them and implement them across all projects you do.



After you set-up the redirects you will test the survey to ensure the redirects are working and the IDs are passed over to you.

Testing your project is required before launching to ensure everything is working! We recommend testing for both a terminate and a complete to be sure that your redirects are in correctly.

To start testing, select the **"test"** button.



This will produce a pop-up that autofills in a unique test ID.
Click on or copy that URL into your browser on incognito to test.

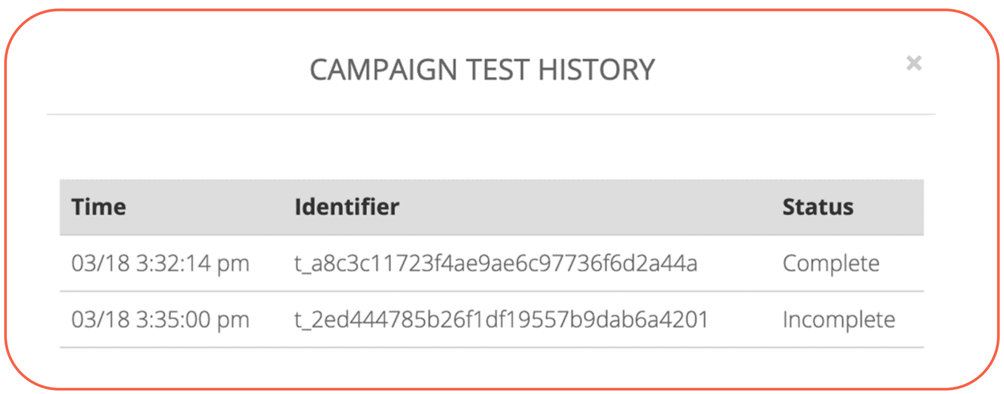
URLs

Testing you project

This should take you to the survey you have built. Once you have finished filling out your survey, you should be automatically redirected back to TapResearch and see a page similar to this:

Note: you can see the transaction ID appended in the url. If you don't see a screen similar to this, check your set-up of the redirects.

You can view all your tests by clicking the **"Results"** button.


CAMPAIGN TEST HISTORY

Time	Identifier	Status
03/18 3:32:14 pm	t_a8c3c11723f4ae9ae6c97736f6d2a44a	Complete
03/18 3:35:00 pm	t_2ed444785b26f1df19557b9dab6a4201	Incomplete

You will get a pop up with the campaign test history:

Incomplete means that the redirect was not successful. You must see at least one complete or disqualify in order to be able to launch your project.

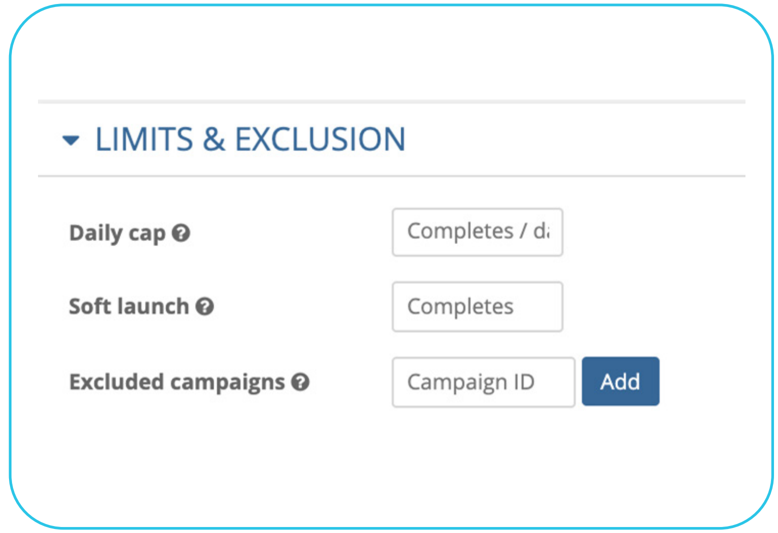
Limits and Exclusions

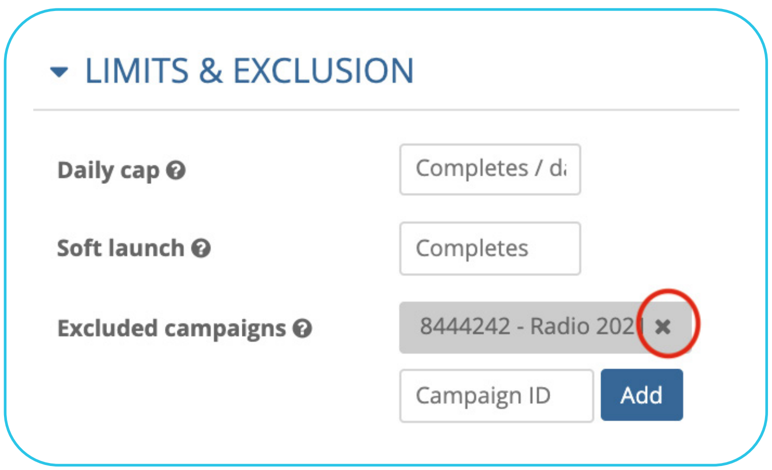
When you are ready to run your campaign, you can place limits and exclusions on it to control the flow of traffic and who gets in.

Daily cap:
This will limit the number of people who are able to complete the survey per day. This will pace the selected number of people out through the day.

Soft launch:
This will allow you to select a fixed number of respondents into your survey. Once it reaches this number, it will pause the project.

Excluded campaigns:
Here you can select individual campaigns that you want to dedupe. This is particularly helpful if you are running a project in waves, and you do not want people from the last project participating in the current one. When you clone a project, the original one will automatically be excluded from the clone.



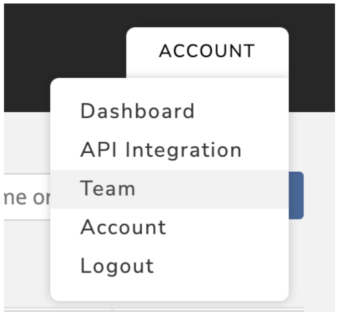


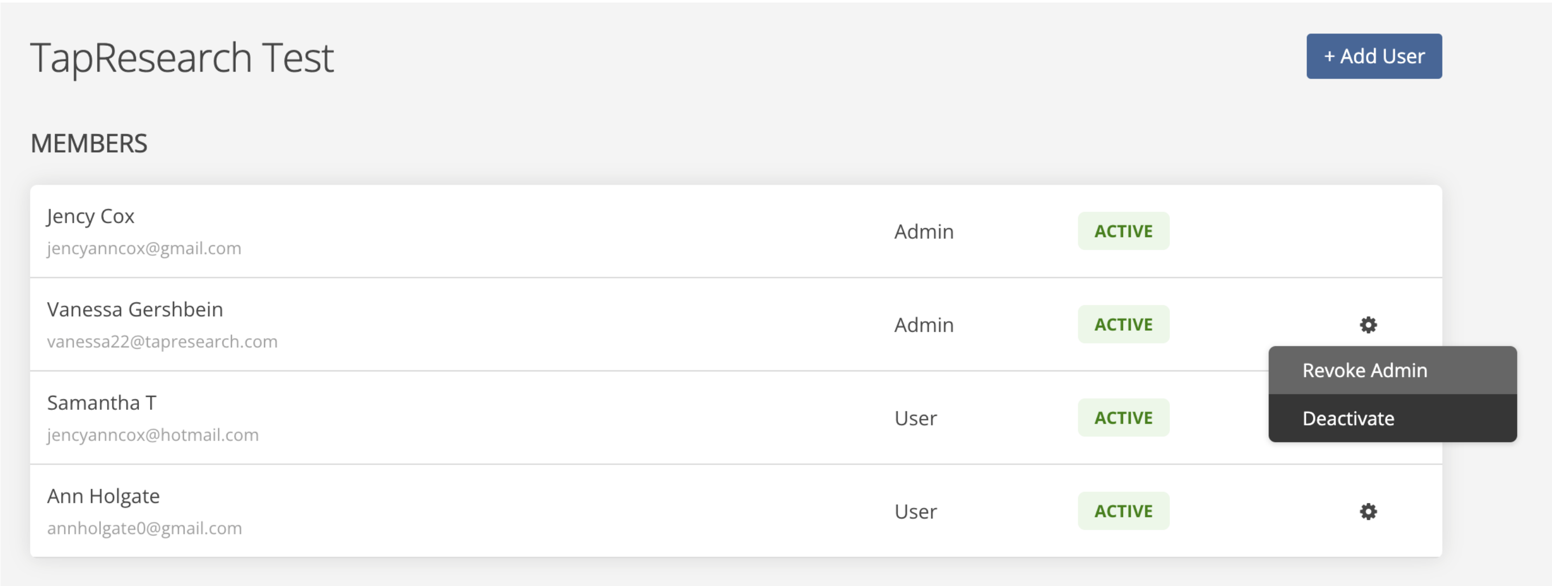
To remove an exclusion,
simply click on the **X** on the right sight of the campaign.

Teams & Users

With your Team Dashboard you are able to manage your team, assign admin access, invite and deactivate team members.

Under your account click, Team. You will be taken to the below dashboard.





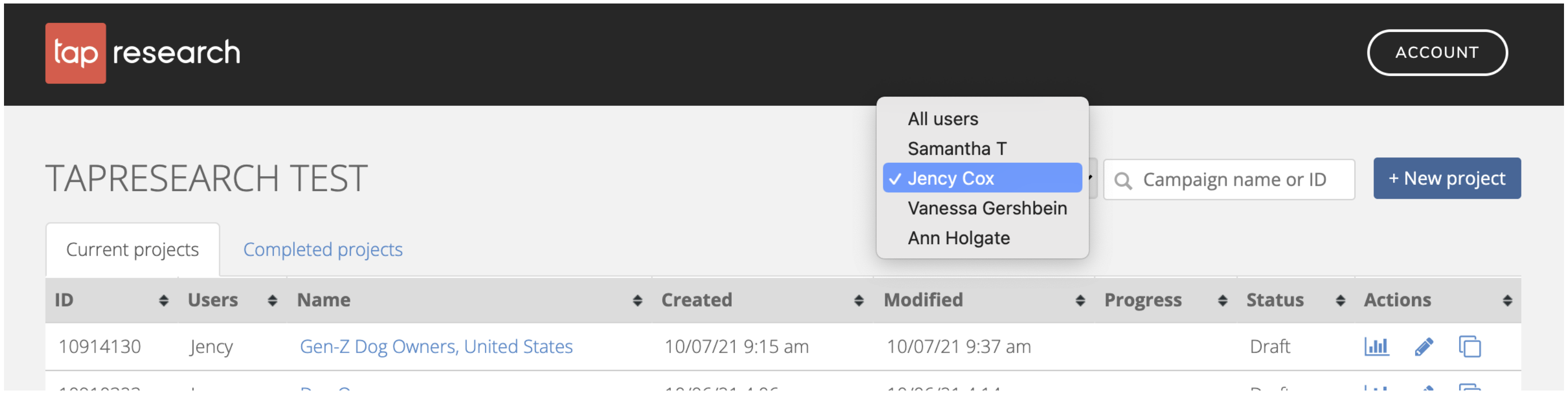
Click **+Add User** to invite other team members

Click the **Gear** of any team member to assign admin, revoke admin, or deactivate an account.

Teams & Users

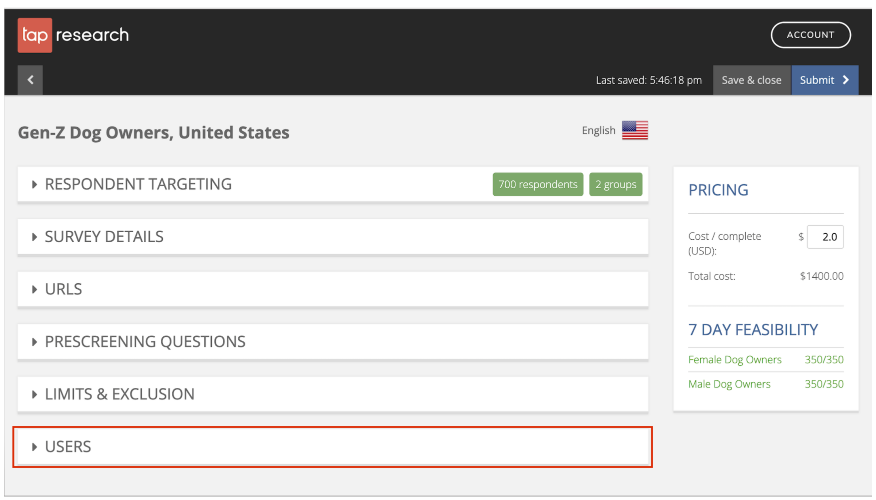
You can view your team members dashboards and add team members to your projects to collaborate on projects.

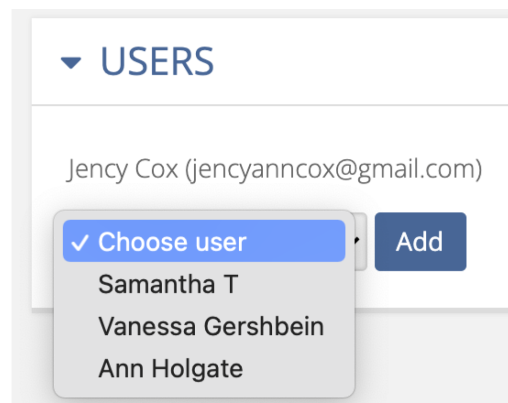
First, you can click on the **User** drop down in your main dashboard to navigate to other team members dashboards.



Second, when you are building your survey, you can click on the **User tab,** Select the team members you'd like to collaborate with and click **Add**.

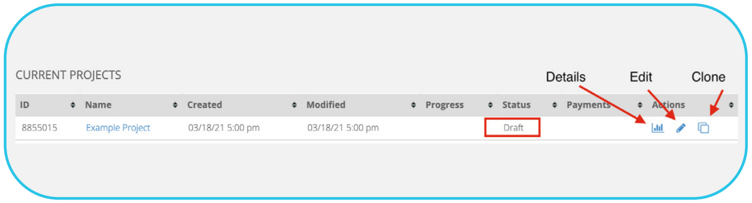
The project will appear on all user's main dashboard and they will receive all automatic project update emails.





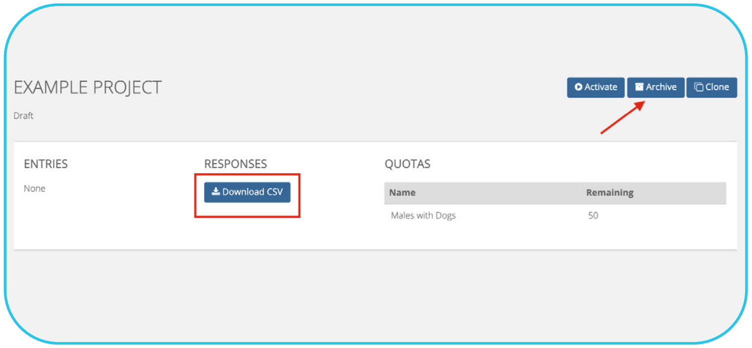
Home Dash

When you create projects, they will appear here on the home dash.
The Status will let you know if the project is a Draft, Active, Paused or Complete.



The Details button will take you to this screen:

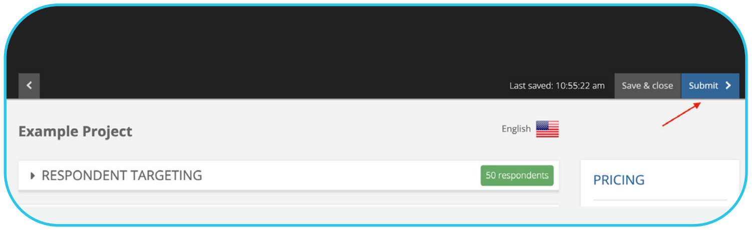
Here you can download the demographic data using the Download CSV buttons. This will provide additional information from the respondents who have completed your survey. These are things that they have answered in their profile such as age, race, gender, household income, and many more questions.



If you no longer want to see this project on your home dashboard, click the **Archive** button. You will still be able to search for a project that has been archived. It will just be hidden from the main screen. In that same row, you can also Activate or Clone a project.

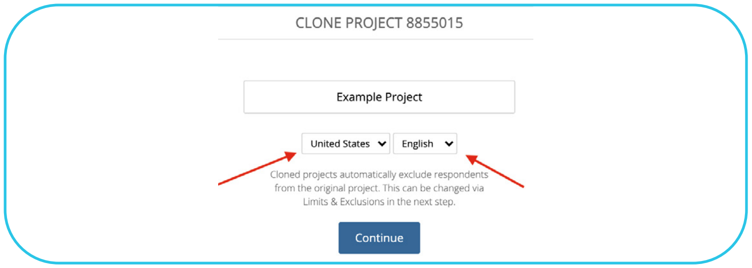
The Edit button will take you here:

You can also get here by clicking on the project name. Here you can make edits to a project, increase the number of respondents, adjust the limits and exclusions, change the price, or add users. Each time you come to this screen, the project will pause if it was previously active. The **Submit** button will be labeled as Reactive and you will need to remember to relaunch your survey. The Reactivate button will save your changes and launch the project. If you want to make changes but do not want the project in field, use the Save & close instead.



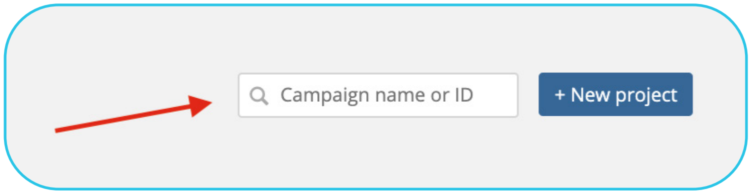
The Clone button will take you here:

If you are running a project across multiple countries or in different languages, you can make these changes here to quickly recreate the next project.



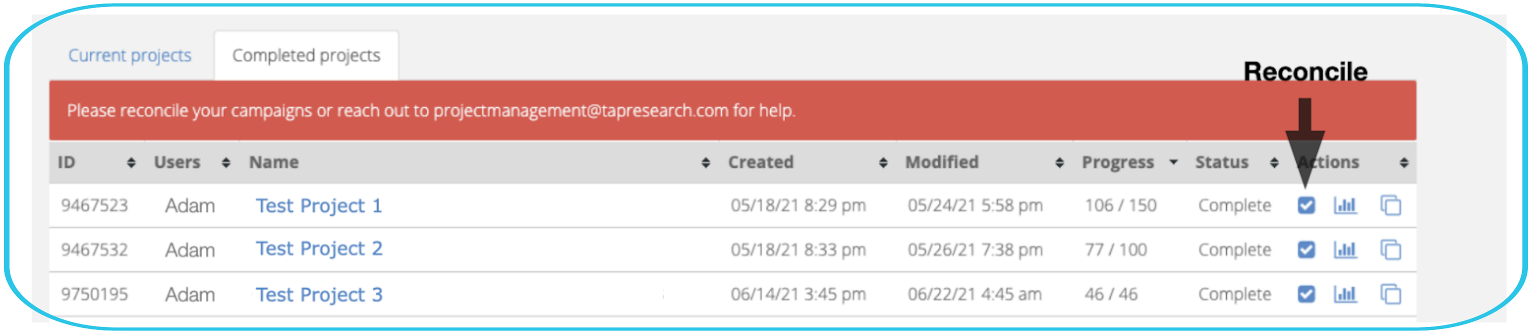
Search:

If you need to find a project of any status, you can type in the ID or name here:



Reconciliation

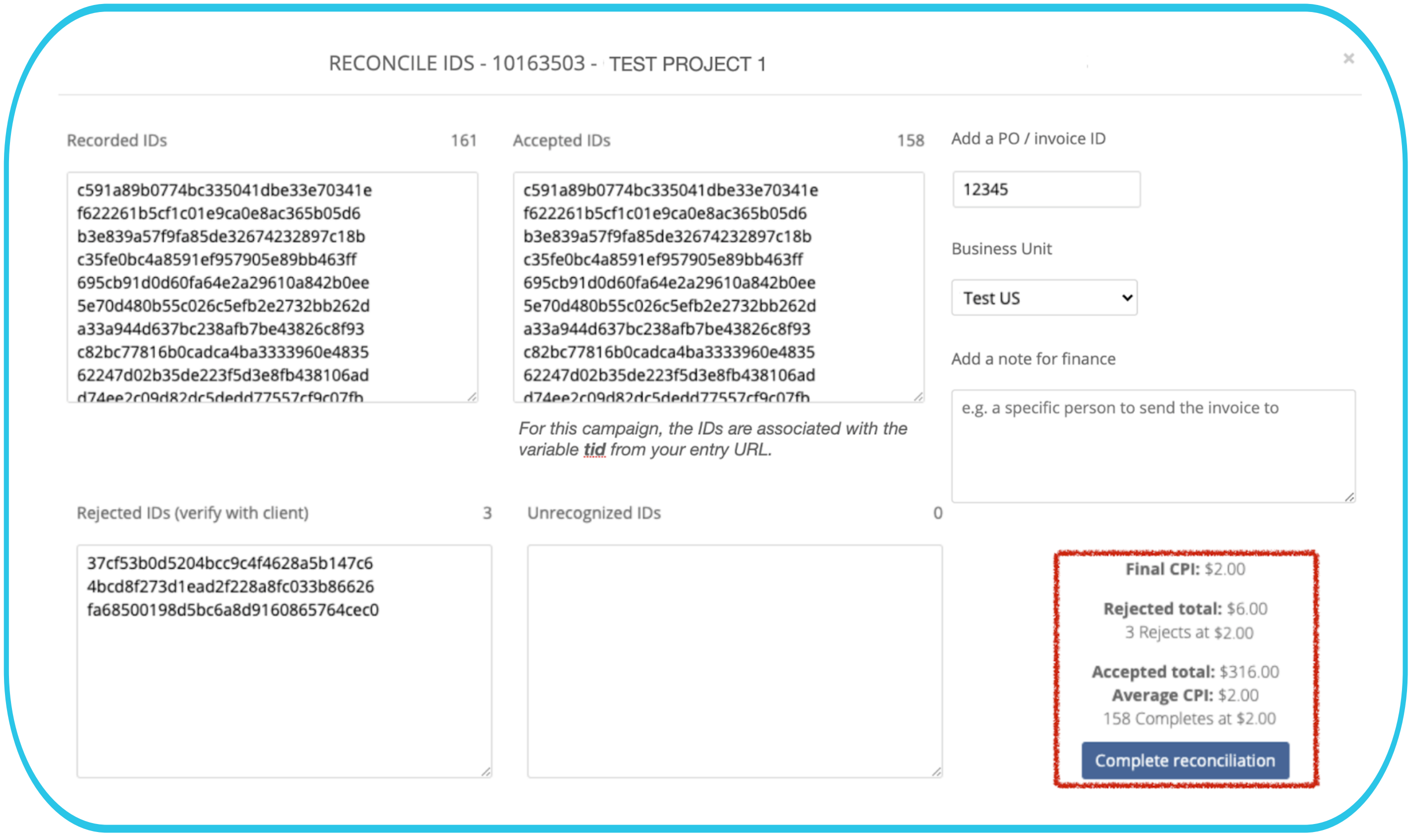
When a project reaches its goal, all users will get an email alert letting them know that the project is paused. Once your data is checked and you have your final IDs, follow these steps:



- After filtering to the completed projects tab, press the Reconcile button
- Copy/Paste the "Accepted IDs" into the appropriate input box
- This dash will show all rejected IDs and also IDs that aren't associated with the project.
- NOTE: If you have a list of Accepted IDs that span multiple projects in the Tap DIY system, you can paste that list into each reconciliation and our system will only accept and charge for the IDs that match each project.

Reconciliation

- We'll show all completes per CPI for the accepted IDs, an average CPI, and the grand total.
- Add in the PO# if needed.
- If your account has multiple offices for billing, you can select the office here.
- If needed, add any additional notes for our finance team to include on the invoice.
- If all looks correct, press "Complete Reconciliation and you're done!



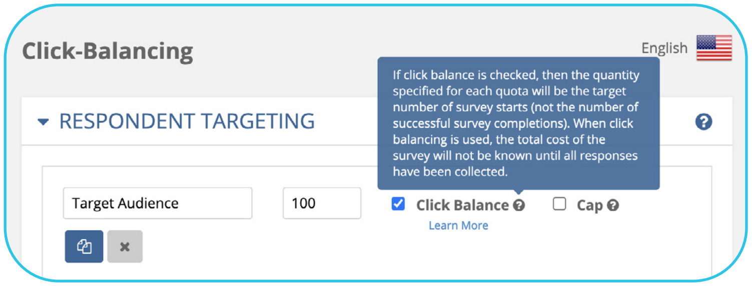
Advanced Functionalities

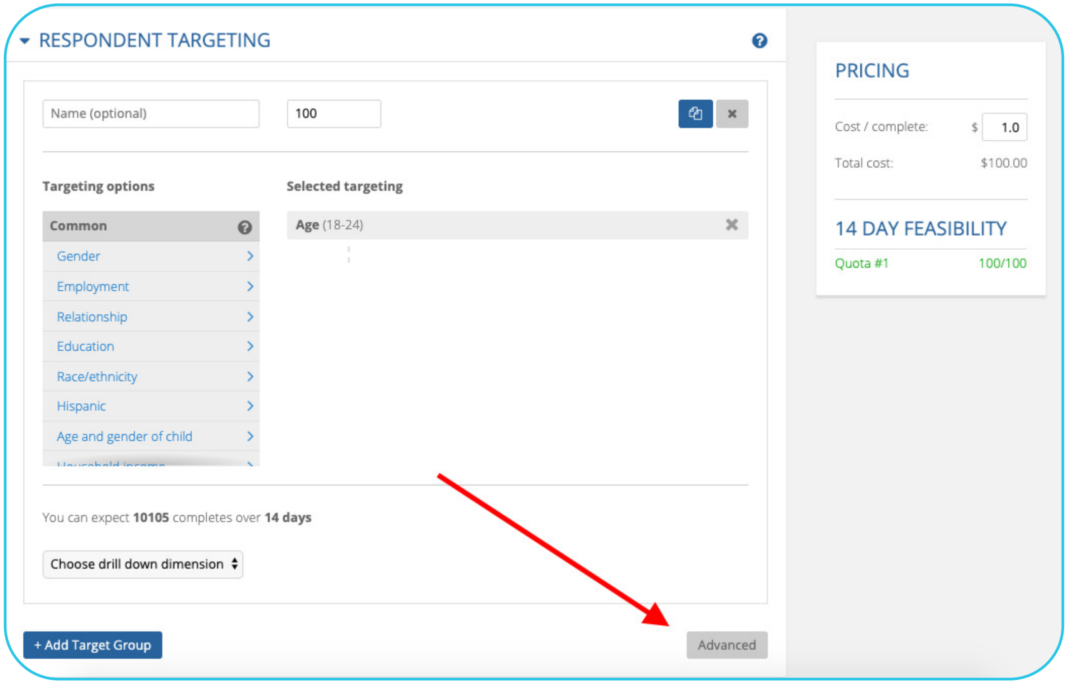
Click Balancing

Under our "respondent targeting" section where you can add in quotas, you will see a box you can click to indicate that you want to balance by clicks!

Once you check, click-balancing feasibility will be based on matches not completes. Additionally, total costs will not be displayed because the number of completes is unknown.

***Pro Tip:** If you still want to have the ability to cap completes project-wide you can use soft launch under the "limits & exclusions" section - this will pause the project when you hit a certain number of completes project-wide.*





Recontact set up

Recontacting is used if you'd like to get in contact with respondents that took a past survey.

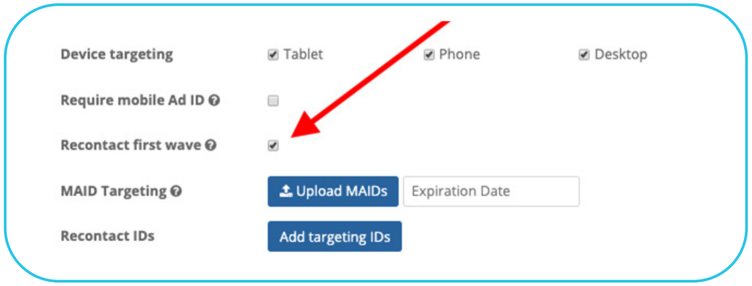
If you know that a project will be a recontact in the first wave, we are much more successful. This is because we'll target a subset of users that we know come into our system often. If you specify a recontact in the first wave and the recontacting is within 2 weeks then we see about 50% return rate.

The longer they wait to recontact, the less likely we are to have the respondent return. If you don't say it's a recontact in the first wave we usually only see a 10% return rate.

In your first project, you will target users that often visit TapResearch. This gives a higher chance of returning for the second survey.

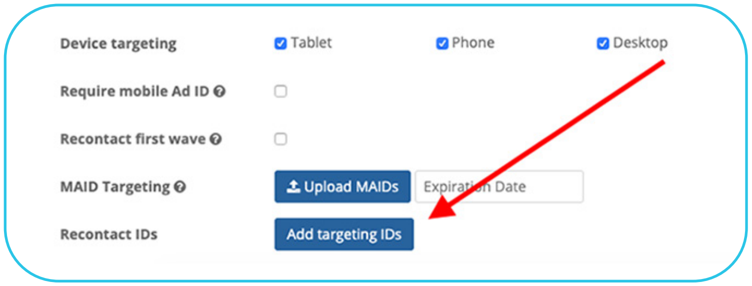
In the targeting section, click on **Advanced**.

Advanced Functionalities



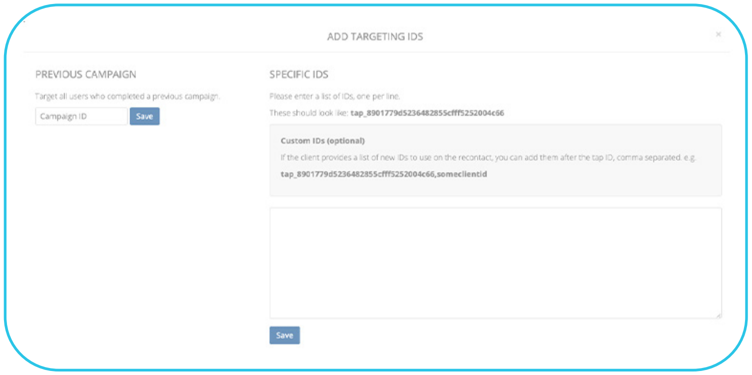
Once “recontact first wave” is selected,
you can continue with your first project as normal.

Note: If you didn’t select this “recontact first wave” button on the first project, you can still recontact people! However the response rate will be much lower.



Once you are ready to recontact, you will set up a brand new campaign. You cannot use the first project for this; you must make a new project.

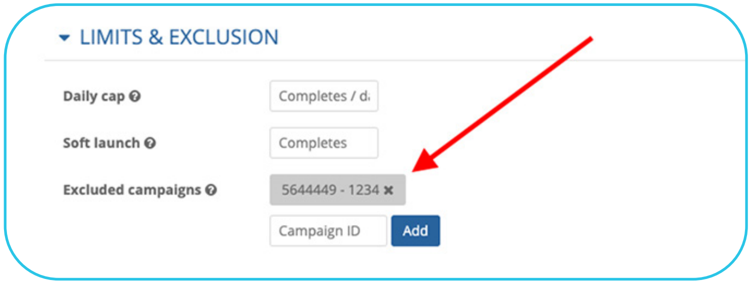
You will again open the “advanced” settings and click on **“Add targeting IDs”**



This is where you can either add in the IDs of those you’d like to return or you can add in the past campaign number.

This will allow anyone who completed the last project will be able to re-enter.

Advanced Functionalities



You'll also want to be sure that the previous project is not in the excluded campaigns list in the Limits and Exclusion section.

If you see the past project in this section, use the **X to remove** it.

Lastly, you'll need to adjust your link. It will need to create a custom variable to append both the old ID and the new ID. The old ID will use {RETARGET_IDENTIFIER} and the new ID will use {ID}.

Here is just an example:
https://www.surveytest.com?id={RETARGET_IDENTIFIER}&tid={ID}
The correct substitution values can always be found in the URL section.

Support

TapResearch's team is committed to ensuring you receive the support you need! We have a help center at **help.tapresearch.com** with additional resources.

You can also reach out to our team using either the orange chat function on the right bottom corner of your TapResearch dashboard or by emailing **projectmanagement@tapresearch.com** directly.

We are always looking for feedback so please reach out to us! Let us help you be successful!