ESOMAR 28

The answers to ESOMAR's 28 questions to help online research buyers

NOBODY'S UNPREDICTABLE

INTRODUCTION

The primary aim of these 28 Questions is to increase transparency and raise awareness of the key issues for researchers to consider when deciding whether an online sampling approach is fit for their purpose. Put another way, the aim is to help researchers to ensure that what they receive meets their expectations. The questions are also designed to introduce consistent terminology for providers to state how they maintain quality, to enable buyers to compare the services of different sample suppliers. Notes on the context of the questions explain why the questions should be asked and which issues researchers should expect to be covered in the answer.

These new questions replace ESOMAR's "26 Questions to help Research Buyers of Online Samples". ESOMAR has updated the text to recognize the ongoing development of techniques. While some of the questions remain constant, new questions have been added to incorporate new techniques and new technology in this area. In particular, this revision recognizes the broad trend within the industry to build online samples from multiple sources rather than relying on a single panel.

ABOUT COMPANY

Ipsos was founded in 1992 in the Czech Republic under the name Tambor.

Tambor, as a start-up company has developed from two employees in 1992 to 150 employees in 2014. In 1996, Tambor was founded in Slovakia, which was fast to become the third largest agency in Slovakia.

In 2007, Tambor merged with the international company Ipsos. Utilizing their local experience, initiative and excellent employees on the Tambor side and support from Ipsos, especially in the product area, led to obtaining the market leader position in 2010 in the Czech Republic and securing third place in Slovakia.

In 2013, the company name was shortened from Ipsos Tambor to Ipsos.

COMPANY PROFILE

1. WHAT EXPERIENCE DOES YOUR COMPANY HAVE IN PROVIDING ONLINE SAMPLES FOR MARKET RESEARCH?

Context: *This answer might help you to form an opinion about the relevant experience of the sample provider. How long has the sample provider been providing this service and do they have for example a market research, direct marketing or more technological background? Are the samples solely provided for third party research, or does the company also conduct proprietary work using their panels?*

Ipsos was founded in 1992 in the Czech Republic under the name Tambor. In 2007, the company Tambor
merged with the international firm Ipsos. In 2010, Ipsos became the market leader in the Czech Republic.
In 2009, Ipsos decided to build an online panel in the Czech Republic, which broadened the standard data collection methods such as PAPI, CAPI and CATI.
This panel is also offered to other agencies as a data collection solution. Respondents are not used for direct marketing.
We pay attention to the protection of confidential information; projects are assigned a number to avoid disclosure of client and research topics.
Panel size and number of completed questionnaires increase from year to year. Last year, we completed more than 320,000 questionnaires on the panel of 65,000 registered members with a response rate higher than 85%.
For your interest, we collected 850,000 questionnaires last year throughout the company across all methodologies using the interviewer network of 200 trained interviewers with laptops, 150 tablets and more than 170 telephone interviewers. In all of these data collection methods we offer cooperation in an online panel. Besides snowballing, offline recruitment is a main source of new respondents.

SAMPLE SOURCES & RECRUITMENT

2. Please describe and explain the type(s) of online sample sources from which you get respondents. Are these databases? Actively managed research panels? Direct marketing lists? Social networks? Web intercept (also known as river) samples?

Context: The description of the types of sources a provider uses for delivering an online sample will provide insight into the quality of the sample.

We collected 850,000 questionnaires last year throughout the company across all methodologies using an interviewer network of 200 trained interviewers with laptops, 150 tablets and more than 170 telephone interviewers including group discussions and CLT. In all of these data collection methods we offer cooperation in an online panel advertised on https://casicz.ipsos.cz. Here, everybody can become familiar with types of cooperation, membership conditions, remuneration and registration. Thanks to this offline recruitment, the panel is representative of the population of the Czech Republic.

SAMPLE SOURCES & RECRUITMENT

3. If you provide samples from more than one source: How are the different sample sources blended together to ensure validity? How can this be replicated over time to provide reliability? How do you deal with the possibility of duplication of respondents across sources?

***Context:** The variation in data coming from different sources has been well documented. Overlap between different panel providers can be significant in some cases and de-duplication removes this source of error, and frustration for respondents.*

Before joining the panel, everybody is required to fill out an extensive personal questionnaire. In addition to basic personal data, phone numbers and bank accounts are required to be filled out. Thanks to this information, especially bank account information, we regularly review possible duplications and remove possible scammers. Before starting to cooperate with future panelists, we verify the accuracy of the information over the phone and compare this information with reality.

SAMPLE SOURCES & RECRUITMENT

4. Are your sample source(s) used solely for market research? If not, what other purposes are they used for?

Context: *Combining respondents from sources set up primarily for different purposes (like direct marketing for example) may cause undesirable survey effects.*

CASI panel is only used for market research; no other activities are carried out on this panel.

5. How do you source groups that may be hard to reach on the internet?

Context: *Ensuring the inclusion of hard-to-reach groups on the internet (like ethnic minority groups, young people, seniors etc.) may increase population coverage and improve the quality of the sample provided.*

Thanks to the offline recruitment, the CASI panel is representative of the population of the Czech Republic. Using the interviewing network and data collection of laptops, tablets, telephones, group discussions and CLT, we collected 850,000 questionnaires last year. This large amount of questionnaires, across the whole country, covers a broad spectrum of people from all socio-demographic groups, including groups that are difficult to reach. If the target group is still missing, it is possible to do a special recruitment.

SAMPLE SOURCES & RECRUITMENT

6. If, on a particular project, you need to supplement your sample(s) with sample(s) from other providers, how do you select those partners? Is it your policy to notify a client in advance when using a third party provider?

Context: *Many providers work with third parties. This means that the quality of the sample is also dependent on the quality of sample providers that the buyer did not select. Transparency is essential in this situation. Overlap between different providers can be significant in some cases and de-duplication removes this source of error, and frustration for respondents. Providers who observe process standards like the ISO standards are required to give you this information.*

We only use respondents from a single database of our CASI panel, where we have established a powerful system for duplicate detection. Duplicates are recognized from an extensive entry questionnaire, which includes personal information, telephone numbers and bank account numbers where we also pay out rewards to. If an adhoc request of an additional database is made, it is possible to check the duplicate with email addresses, cookies or other identifying features.

SAMPLING & PROJECT MANAGEMENT

7. What steps do you take to achieve a representative sample of the target population?

Context: The sampling processes (i.e. how individuals are selected or allocated from the sample sources) used are the main factor in sample provision. A systematic approach based on market research fundamentals may increase sample quality.

The application designed to manage the CASI panel contains data from the Czech Statistical Office (from the last census in 2011), from which we calculate quotas for the desired sample. These quotas are then being filled by appropriate respondents on the basis of the information from the personal questionnaire. The selected criteria are: age, sex, education, size of residence and region. Data collection takes place in several stages to cover possible missing quotas.

8. Do you employ a survey router?

Context: A survey router is a software system that allocates willing respondents to surveys for which they are likely to qualify. Respondents will have been directed to the router for different reasons, perhaps after not qualifying for another survey in which they had been directly invited to participate, or maybe as a result of a general invitation from the router itself. There is no consensus at present about whether and how the use of a router affects the responses that individuals give to survey questions.

Our application, which controls the CASI panel directly, contains a survey router. The database includes respondents, which agree to participate in research projects and provide us with personal information for selection. At the same time, the application uses a number of control mechanisms that validate the veracity of the data and their consistency over time.

SAMPLING & PROJECT MANAGEMENT

9. If you use a router: Please describe the allocation process within your router. How do you decide which surveys might be considered for a respondent? On what priority basis are respondents allocated to surveys?

Context: Biases of varying severity may arise from the prioritisation in choices of surveys to present to respondents and the method of allocation.

The exact algorithm has been set for sample selection. First, we will remove respondents who reported false information or repeatedly fail to respond to offers of cooperation. Furthermore, the system selects all who meet the selection criteria. Subsequently, required number of respondents is selected to the survey to meet the standard that defines how often a person should be included in the research.

10. If you use a router: What measures do you take to guard against, or mitigate, any bias arising from employing a router? How do you measure and report any bias?

Context: If Person A is allocated to Survey X on the basis of some characteristic then they may not be allowed to also do Survey Y. The sample for Survey Y is potentially biased by the absence of people like Person A.

Our application keeps track of the history of the participation of individual respondents including the topic of the research/project. This allows us to make sure that respondents are not being affected by previous research/projects. This system ensures better selection of respondents thereby achieves more accurate and more valid data.

SAMPLING & PROJECT MANAGEMENT

11. If you use a router: Who in your company sets the parameters of the router? Is it a dedicated team or individual project managers?

Context: It may be necessary to try to replicate your project in the future with as many of the parameters as possible set to the same values. How difficult or easy will this be?

Application is fully managed by a project manager. The system allows for a simple selection between:

- Random selection of respondents who meet requirements
- Using the same respondents from another research
- Exclusion of specific research respondents who could be affected

SAMPLING & PROJECT MANAGEMENT

12. What profiling data is held on respondents? How is it done? How does this differ across sample sources? How is it kept up-to-date? If no relevant profiling data is held, how are low incidence projects dealt with?

Context: The usefulness to your project of pre-profiled information will depend on the precise question asked and may also depend on when it was asked. If real time profiling is used, what control do you have over what question is actually asked?

Each person is required to fill in an extensive personal questionnaire upon joining the panel. There are a total of 150 questions. Please see an example below:

- Socio-demo data
- Finance
- Internet
- Lifestyle
- Employment
- Consumption
- Shopping
- Healthcare
- Travel
- Household
- Children
- Politics

In addition to the entry questionnaire, each respondent updates the questionnaire once a year.
If the system detects an inconsistent response between the personal questionnaire and the question in the project, the respondent is notified and is allowed to change the information in the personal questionnaire.

SAMPLING & PROJECT MANAGEMENT

13. Please describe your survey invitation process. What is the proposition that people are offered to take part in individual surveys? What information about the project itself is given in the process? Apart from direct invitations to specific surveys (or to a router), what other means of invitation to surveys are respondents exposed to? You should note that not all invitations to participate take the form of emails.

Context: The type of proposition (and associated rewards) could influence the type of people who agree to take part in specific projects and can therefore influence sample quality. The level of detail given about the project may also influence response.

The application sends email and SMS alerts with basic information about the project according to specified criteria as well as the URL to enter the questionnaire itself. The application also monitors whether each respondent fills in the questionnaire, or it points out the approaching end of data collection. If a respondent does not fill in the questionnaire, they are replaced by another respondent according to appropriate criteria.

14. Please describe the incentives that respondents are offered for taking part in your surveys. How does this differ by sample source, by interview length, by respondent characteristics?

Context: The reward or incentive system may impact on the reasons why people participate in a specific project and these effects can cause bias to the sample.

Each questionnaire response is honored with a cash price. Its amount depends on the length of the questionnaire. Additional motivational competitions are offered to those who did not pass the recruiting criteria.

15. What information about a project do you need in order to give an accurate estimate of feasibility using your own resources?

Context: The "size" of any panel or source may not necessarily be an accurate indicator that your specific project can be completed or completed within your desired time frame.

To determine feasibility, we need the specification of the target group, sample size, penetration and quotas. In addition to these requirements, it's necessary to indicate the length of the questionnaire and timing.

16. Do you measure respondent satisfaction? Is this information made available to clients?

Context: Respondent satisfaction may be an indicator of willingness to take future surveys. Respondent reactions to your survey from self-reported feedback or from an analysis of suspend points might be very valuable to help understand survey results.

The satisfaction of our respondent is very important to us. In addition to our website with general information and FAQs, we also have an email box through which we communicate with respondents. Here they can ask any question related to our panel (feedback, suggestions for improvement, questions, explorations, comments, etc.). We also conduct 1-year satisfaction research studies among respondents. The results are taking into account in further development and modification.

17. What information do you provide to debrief your client after the project has finished?

Context: One should expect a full sample provider debrief report, including gross sample, start rate, participation rate, drop-out rate, the invitation/contact text, a description of the field work process, and so on. Sample providers should be able to list the standard reports and metrics that they make available.

For each project, we register the average length of the questionnaire, the response rate, the fulfillment of individual quotas, the drop out rate in various fields, etc. All this information can be provided to the client upon request.

DATA QUALITY & VALIDATION

18. WHO IS RESPONSIBLE FOR DATA QUALITY CHECKS? IF IT IS YOU, DO YOU HAVE IN PLACE PROCEDURES TO REDUCE OR ELIMINATE UNDESIRED WITHIN SURVEY BEHAVIOURS, SUCH AS (A) RANDOM RESPONDING, (B) ILLOGICAL OR INCONSISTENT RESPONDING, (C) OVERUSE OF ITEM NON-RESPONSE (E.G. "DON'T KNOW") OR (D) SPEEDING (TOO RAPID SURVEY COMPLETION)? PLEASE DESCRIBE THESE PROCEDURES.

Context: The use of such procedures may increase the reliability and validity of the survey data.

In our panel, we use a wide range of control mechanisms that are based on industry standards. We pay great attention to checks and we try to automate control mechanisms due to the large volume of the questionnaires. The performed checks are:

- Telephone verification of the respondent and their personal data. After 2 weeks our operator calls the respondent to ask a few questions from the personal questionnaire and the system verifies if the answers match.
- Duplicity checks – through the phone number and bank account we check and possibly remove duplicate panel members.
- Frequency of research classification, including monitoring of the repeating research topics. On average, each respondent takes approximately 9 studies annually. The system checks that a respondent was not included in more than 1 study in 14 days. If the study has the same topic, this period is extended to two months.
- Length of the questionnaire checks, including sections of the questionnaires – We measure not only overall length of the questionnaire, but also the time spent on selected parts of the questionnaire (for example: grid questions, the concept reading, viewing videos, etc.). We also measure the average length on one page of the questionnaire.

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DATA QUALITY & VALIDATION

- Checking answers from the research study compared to the personal questionnaire – In each survey, we randomly question respondents on their answers from the personal questionnaire and check their compliance.
- Checking open ended questions – when coding the open ended questions, we record a database of unsuitable verbatims and all open ended questions are then checked against this database.
- Checking the logical links between answers – checking logical links between individual answers are being made when programming the questionnaire and also during the analysis of the data.

Automation of the process guarantees us greatest control over objectivity (elimination of the human factor).

DATA QUALITY & VALIDATION

19. How often can the same individual be contacted to take part in a survey within a specified period whether they respond to the contact or not? How does this vary across your sample sources?

Context: Over solicitation may have an impact on respondent engagement or on self-selection and non-response bias.

On average, each respondent takes approximately 9 studies annually. The system checks that respondent was not included in more than 1 study in 14 days. If the study has the same topic, this period is extended to two months.

20. How often can the same individual take part in a survey within a specified period? How does this vary across your sample sources? How do you manage this within categories and/or time periods?

Context: Frequency of survey participation may increase the risk of undesirable conditioning effects or other potential biases.

On average, each respondent takes approximately 9 studies annually. The system checks that respondent was not included in more than 1 study in 14 days. If the study has the same topic, this period is extended to two months.

DATA QUALITY & VALIDATION

21. Do you maintain individual level data such as recent participation history, date of entry, source, etc., on your survey respondents? Are you able to supply your client with a project analysis of such individual level data?

Context: This type of data per respondent including how the total population is defined and how the sample

Application for managing the projects includes a database of respondents and projects. Specifically, we record the following data:

- Project number
- Start of the field and end of the field
- All included respondents inclusive of the response code
- Length of the interview, average length
- Check results and a record of the respondent evaluation
- The amount of remuneration, including inclusion in the payment system

DATA QUALITY & VALIDATION

22. Do you have a confirmation of respondent identity procedure? Do you have procedures to detect fraudulent respondents? Please describe these procedures as they are implemented at sample source registration and/or at the point of entry to a survey or router. If you offer B2B samples what are the procedures there, if any?

Context: Confirmation of identity can increase quality by decreasing multiple entries, fraudulent panellists, etc.

- Telephone verification of the respondent and their personal data. After 2 weeks our operator calls the respondent to ask a few questions from the personal questionnaire and the system verifies if the answers match.
- Duplicity checks – through the phone number and bank account we check and possibly remove duplicate panel members.

POLICIES & COMPLIANCE

23. Please describe the 'opt-in for market research' processes for all your online sample sources.

Context: The opt-in process indicates the respondents' relationship with the sample source provider. The market generally makes a distinction between single and double opt-in. Double opt-in refers to the process by which a check is made to confirm that the person joining a panel or database wishes to be a member and understands what to expect (in advance of participating in an actual survey for a paying client).

Upon joining the panel, each respondent is made familiar with the conditions of the participation and grants consent to receive research studies. In a personal profile, a respondent can enter a „holiday period". During this period the respondent will not receive any research projects. Respondents can also terminate or suspend cooperation anytime.

24. Please provide a link to your Privacy Policy. How is your Privacy Policy provided to your respondents?

Context: Not complying with local and international privacy laws might mean the sample provider is operating illegally. An example privacy policy is given in the ESOMAR Guideline for Online Research.

All data collection and data handling are governed by the applicable local laws. Ipsos Czech Republic is registered with the Office for Personal Data Protection, as well as meets industry standards (SIMAR and ESOMAR) for online data collection that are audited once a year by an independent commission.

25. Please describe the measures you take to ensure data protection and data security.

Context: The sample provider usually stores sensitive and confidential information on panellists and clients in databases. These data need to be properly secured and backed-up, as does any confidential information provided by the client. The sample provider should be able to provide you with the latest date at which their security has been evaluated by a credible third-party

Asset management

The IT department is responsible for the maintenance of hardware and software. Part of the equipment is installed in a server at Ipsos HQ. Another piece of equipment is located in a data center (GTS). Hardware components are changed at regular intervals to make sure all systems and applications operate smoothly. The software is updated whenever necessary or desired, for example due to a decrease in safety or termination of official support.

Operations security

All system data and data storage are being completely backed up at regular intervals. Backups are available retroactively for several seasons and stored in different locations on several data carriers. As a further protection used at individual stations/server is antivirus software, which is distributed and updated automatically using the active directory.

POLICIES & COMPLIANCE

26. What practices do you follow to decide whether online research should be used to present commercially sensitive client data or materials to survey respondents?

Context: There are no foolproof methods for protecting audio, video, still images or concept descriptions in online surveys. In today's social media world, clients should be aware that the combination of technology solutions and respondent confidentiality agreements are "speed bumps" that mitigate but cannot guarantee that a client's stimuli will not be shared or described in social media.

To protect sensitive information, we use methods that make it difficult to copy information, such as displaying the concept only 1 time for a limited number of seconds or displaying the concept only when you press multiple keys simultaneously. At the same time, we inform respondents that all data provided in the survey is confidential and it is not legally possible to publicly distribute it.

27. Are you certified to any specific quality system? If so, which one(s)?

Context: Being certified may require the supplier to perform tasks in a pre-determined manner and document procedures that should be followed.

Ipsos uses an internal system of guidelines and rules that are in accordance with the local law and meets industry standards (SIMAR and ESOMAR) for online data collection that are audited once a year by an independent commission.

POLICIES & COMPLIANCE

28. Do you conduct online surveys with children and young people? If so, do you adhere to the standards that ESOMAR provides? What other rules or standards, for example COPPA in the United States, do you comply with?

Context: The ICC/ESOMAR International Code requires special permissions for interviewing children. These are described in the ESOMAR Online Research Guideline. In the USA researchers must adhere to the requirements of the Children's Online Privacy Act (COPPA). Further information on legislation and codes of practice can be found in Section 6 of ESOMAR's Guideline for Online Research.

In accordance with the valid legislation of the Czech Republic, we carry out research independently only with respondents over 15 years of age. Within the personal information we record information about our respondent's children. Younger people may be interviewed only with the consent and presence of a parent or legal guardian.

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