ESOMAR 28 Questions To Help Buyers of Online Sample

Answered by OrangeMR

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.

It should be noted that these 28 Questions focus on the questions that need to be asked by those buying online samples. If the sample provider is also hosting the data collection you will need to ask additional questions to ensure that your project is carried out in a way that satisfies your quality requirements.

The 28 Questions complement ESOMAR's Guideline to Online Research which was revised in 2011 to add updated legal and ethical guidance and new sections on privacy notices, cookies, downloadable technology and interactive mobile.

COMPANY PROFILE

1. **What experience does your company have in providing online samples for market research?**

   OrangeMR has over 4 years of online market research experience, sampling, and building and managing online panels. OrangeMR offers a unique, transparent insights exchange that brings together buyers and sellers of research samples providing sample buyers with access to today's research participant. We cater more than 40 countries with over 100 clients over the world. We have grown high up in these businesses through model quality control, very careful and precise attention to detail and overall client satisfaction. OrangeMR is able to provide reliable and powerful metrics to both consumer and business clients. The number of projects we do year-over-year continues to grow rapidly.

   We are able to actively engage with consumers and reach specified target audiences and business profiles, resulting in more precise and complete end data.

SAMPLE SOURCES AND 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?**

   OrangeMR's panels are under control of people who made a conscious decision to participate in online surveys through a registration process.

   We use various methodologies to recruit panelists to its survey and panels:
   - Online recruitment using banners on different portals and websites.
   - Email recruitment through a panel owner's newsletters.
   - Specific invitations sent to a panel owner's database.
   - Social networks.
   - Affiliate traffic.

- Active recruitment via telephone.
- Active recruitment through face-to-face (F2F) interactions.

We have a dynamic sample source. We provide access to high quality, representative respondents in real-time.

OrangeMR re-validates through email if the panel owner has an active panel on their own system and decides to move it to if a potential panel owner has a list of contacts that have expressed interest in joining a panel, but have not recruited as such.

To become or to continue being panel members they are requested to login and activate their account. Panelists are required to complete a double opt-in process by clicking on the panel link and then logging into their account.

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?

OrangeMR ensures the validity of blended responses from OrangeMR and any partner suppliers. We are capable of using state of the art technology for blending sources. We use unique technology that delivers high-quality, reliable and consistent datasets independent of the source of the sample. Our ability to calibrate the difference, counter balances, optimizes and adjusts them in real time.

We have proven in numerous side-by-side studies, this real time, production-ready and Research-hosted application incorporates a set of automated features that measures and control the representative sample dimensions.

We also takes into consideration source bias, and works with the client to ensure balanced sample are deployed for each wave.

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

A. OrangeMR panels are only used for market research. When panelists register, they are informed that the panel is used exclusively for market research. Every panel in the online insights exchange marketplace complies

with the best practices objectives of these ESOMAR 28 Questions. Users of Cint's insights exchange marketplace (i.e. self-service or managed-service customers) are also required to sign an agreement that limits their use of the platform solely for market research purposes.

5. How do you source groups that may be hard to reach on the Internet?
    OrangeMR has a very large collection of panels in one place, recruited using different methods, from different sources, both online and offline. To build a high quality panel, it is necessary to use many panel recruiting partners. That's why OrangeMR works in partnership with both broad-reach portals and special interest sites, resulting in a diversity of panelist profiles. Our partnerships enable us to target and recruit hard-to-reach source groups when required. We continually test, organize, and analyse the acquisition and activation process to provide highly engaged panelists to our market research partners.

    OrangeMR also collaborates closely with these panel owners to continually build the total sourcing pool, to continue to build the leading marketplace for research sample.

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?
    OrangeMR has a formal panel partnership program that maintains industry standards and adheres to best practices. Panel partners go through a rigorous selection process and are evaluated on an ongoing basis, through a comprehensive Request for Information process that delivers quantifiable assessments.

    OrangeMR lets clients have the choice of how they want to sample, and from which unique panels, allowing for single sourcing or even panel blending at a project level. Our goal is to provide our clients with the best sample seamlessly from our vetted list of approved partners. Our team works closely with the client to ensure that selected partners meet all requirements. The client is included in the decision making process when qualified partners are

brought on to provide additional transparency into respondents being provided.

SAMPLING & PROJECT MANAGEMENT

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

   OrangeMR has successfully invested on proprietary sampling platform. We have expertise in comprehensive platform in the industry, where it integrates all functions of the panel management and sampling and is capable of balancing samples different variables simultaneously. The platform automatically provides the correct allocation to achieve the proper distribution based on census data for the specific geography. A sample buyer can also choose to create custom allocations (including age, gender, etc.) on survey send-outs and incoming completes. After discussions with the client and analysts, we'll coordinate these strategies on a project-to-project basis. Initial sample sends can be used to determine consistency to be delivered at the time of full launch.

8. **Do you employ a survey router?**

   Survey routing is an optimal experience for panel respondents, so OrangeMR utilizes this technology to the highest degree. OrangeMR increases panel research and sample efficiency by addressing deficiencies in first generation stand-alone router systems, which can often result in poor panelist experience and higher panelist churn.

   We continually optimize the profile of our panel and provide clients with richer profiles for which to qualify our community members in their research. OrangeMR leverages existing panel member profile information when matching a panelist to a survey, minimizing the number of qualifying questions and the time in the optimization and routing process. Keeping panel members incentivized, happy and continuing to take surveys. The router can be controlled on both a source and project basis.

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?

In most cases, a random selection algorithm is used in our router. Participants are sent to surveys randomly while taking into account the needed effort for successfully fielding each survey.

The needed effort is determined by weighting each survey's chance of receiving a participant based on the following factors:

- Volume of needed completes
- Incidence rate
- Time in field
- Priority survey setting

With random selection, it is not possible to predict which respondent will go to which survey (unless the order, timing and behavior of every respondent and pseudo random number generator seed are known).

Any indication of suspected bias from router use results in an immediate review, and an institution of a manual invitation process, or removal of the survey in question, if necessary. All surveys within the router have their key metrics monitored throughout the survey run to determine and mitigate potential issues as quickly as possible.

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?

Any indication of suspected bias from router use results in an immediate review, and an institution of a manual invitation process, or removal of the survey in question, if necessary. All surveys within the router have their key metrics monitored throughout the survey run to determine and mitigate potential issues as quickly as possible. It is important that results from a router be stable and reliable. Automated and regular sample deployment helps ensure stability of research results in the Research router. The router

has been used extensively for tracker programs with stable and reliable results.

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?

A. OrangeMR project managers decide whether a project will utilize routing. All routing parameters are set globally by a centralized operations team. A carefully selected and limited number of administrations have access to view or change these parameters. Project managers can neither view nor change the global routing preferences. The router is strictly based on this input data and individual project performance to allocate panelists to the best possible opportunities that match their profile

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?

Standard profile data stored includes: email address, name, address, phone numbers, gender, postal code, year of birth, education level, occupation and all panel specific profiling.

OrangeMR employs a global profiling process across sample surveys and R OrangeMR Panels, which allows us to create quick and accurate feasibility estimates. Our dynamic profiling platform allows for each profiled attribute to be assigned expiration date. When a profiled attribute expires, the dynamic profiling platform serves up the question during the respondent's next online session to ensure all profiled questions are up to date.

OrangeMR also collects and makes available hundreds of additional profiling points that are based on sample buyer needs and/or market requirements. Profile points also vary and are customized to specific geographies.

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

An automatic following system sends email invitations at designated times stipulated by the project manager in consultation with the client. The survey link is posted on each panelist's password-protected surveys or OrangeMR panel home page. A panelist invited to a survey must visit our website and enter his/her email address and password before accessing the link to the survey. This is a more secure process than sending the survey link in an email, which could be opened by anyone with access to that mailbox. Based on research we recommends sending respondents generic survey invitations with limited information about the survey.

Generally, our survey invitation emails notify the respondent of an opportunity to share his/her opinions and will get the reward points to get incentives. The invitations include information about the project itself including topic, length of time required and available reward. A simple graphic and unique link to the client's survey is included with each notification. We'll also include an opportunity for the panelist to opt-out of future notifications, reach our member experience team, and find resources for our program's terms, conditions, and privacy policy.

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?

OrangeMR offer rewards based on the marketplace points. The number of points awarded is calculated by the length of the LOI. On reaching a redemption level set by the panel owner, panelists can redeem their rewards through different online payment partners linked to. The size of the redemption is based in the number of points earned. Panelists can choose to receive their rewards in cash sent to their bank accounts (e.g. via PayPal) or they can shop online with online merchants. Some panels include an option to make payments to a charity. Alternatively, the panel owner can opt to provide the panelists rewards directly. Incentive levels have been set to encourage long-term participation and to discourage professional

respondent who seek to take surveys only to obtain payment. A key feature that drives long-term participation is that panel owners choose an incentive model that works best for their members.

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

In order to provide the best opportunity to match our community members to a client's projects we'll request some information to determine feasibility:

- Study objectives
- Survey length
- Lock out or exclusions periods
- Screening criteria
- Survey quotas
- Census balancing requirements
- Field time.

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

Satisfaction among our community members is a top priority. Respondent satisfaction is based on a standard set of questions asked at the end of the survey. It is not mandatory for our panelists to answer the questions and has no impact on the incentive they receive for completing the main survey. We maintain an open dialogue and adhere to a general policy of transparency with the community.

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

Our project team shares all relevant information with clients during and after the project is finished. It is our usual practice to update our clients with vital statistics such as incidence rate and length of interview after the first 24 hours of fielding to help determine the direction of the rest of the fieldwork.

In addition, the following information is available on all projects hosted Research:

- Response rate
- Incidence rate
- Dropout rate (overall and by question)
- Length of interview
- Invitation text
- Incentive amount
- Total invitations sent
- Where respondents screen out

Data Quality and 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.

OrangeMR has a dedicated quality assurance team, which is responsible for maintenance and advancement of the quality of Research products and services. Through our strict quality monitoring program, we deploy project and company-wide procedures that result in products and services of the highest quality.

Panellists that do not pass agreed-upon checks do not qualify as completes and do not qualify for an incentive. If a sample buyer reports cheaters in a survey, OrangeMR project managers remove these from the survey and alert the Panel Operations department.

OrangeMR applies strict security protocols to ensure the integrity of our data quality. We constantly check respondents for fraudulent behavior. Some of the measures we're able to reduce:

- Speeding
- Duplicate IP addresses

- Duplicate browsers
- Failing trap questions
- Providing duplicate address or phone data

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?

OrangeMR stores detailed survey participation data for each panelist. This includes survey response status and the date and time each survey was started and completed. We select sample based on a number of factors including our panelists' prior participation levels to reduce over utilization. Guidelines for survey invitation volumes vary country to country.

Strict policies have been implemented to monitor and track many metrics associated with our panel members, including frequency of surveys issued and participation history. We ensure that panelists are coming from where they say they are with proxy detection and geography checks. Looking for device manipulation and altered IP addresses we can detect individuals attempting to reach a survey through malicious intent. Utilizing the same browser is blocked across more than one account.

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?

We encourage our panelists to attempt to complete all surveys that they are eligible for. As the sample buyer would expect, a panellist may only complete a specific survey once. Restrictions are implemented on an as-needed basis; we have full control over the frequency of notifications and participation.

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?

OrangeMR maintains data on all our panelists to ensure their participation is returning quality data for clients. Upon request, we're happy to provide additional data around the community at large and their participation efforts.

OrangeMR utilizes an indexing system that gives each panellist a score depending on how active their survey participation is. The participation history is recorded along with exclusion information.

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?

OrangeMR has a range of features to deal with professional/duplicate respondents. The system includes stratified sampling to get various types of respondents, including active and less-active panelists. The length of the surveys is evaluated and compared against individual answers. Project manager identifies and excludes multiple panel respondents both through email address and by name.

OrangeMR continuously analyzes panel data to identify 'fraudulent' or 'inattentive' panellists. Panellist status is updated in cooperation with the panel owner.

Policies and compliance

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

When a respondent clicks on a link from a panel ad — on a recruiting partner's website or in an email campaign — he/she is directed to the appropriate country and language panel registration survey. Each prospective panelist must provide demographic and household information, pass through some validation checks, and agree to the country-specific website Terms and Conditions and Privacy Policy.

When a panelist is invited to a survey, they are informed about the confidential nature of their responses and given the opportunity to 'opt out'. As part of the registration process, panelists are asked to complete key profiling questions, including a confirmation of their consent to join the panel.

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

OrangeMR privacy policy builds trust with panelists. We have sought and implemented localized legal recommendations and requirements into the policy in all countries where we operate consumer panels. Our panel sites require panelists to agree to the privacy policy during registration. The privacy policy includes local privacy standards, rights, and information usage and is always accessible to our panelists through our panel websites.

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

OrangeMR and its clients are all required to adhere to local data protection laws and legislation. This is reflected in Research panel owner agreements. We make sure to handle panelist information with the utmost care.

OrangeMR also requires that all panel owners comply with all applicable law and regulation. We implements accepted information security best practices.

- Access to project information is only granted to the user who creates each project.
- Access panel and panelist information is only granted to the company who owns the panel. This does not include any personal identifiable data.
- Users are automatically logged off after a given period of non-activity.

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?

OrangeMR performs a quality check on every survey before it is made available to panelists. All of our clients are advised that, even with the best security measures, information presented online is not always entirely secure.

The appropriateness of showing sensitive material to online respondents is generally left up to the client. When we are aware that information is sensitive we will counsel that there are no 100% foolproof methods for protecting the information. As long as the client is willing to accept the potential risk, we employ a number of measures to reduce the risk. We also include terms in our member Terms & Conditions to make sure members understand that information shared through surveys and our systems are proprietary and protected.

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

OrangeMR uses a robust set of proprietary internal tools to ensure quality. OrangeMR's experienced Client Operations fieldwork management team is responsible for delivering high quality respondents and results that meet our clients' expectations. Each member of the Client Operations team must complete rigorous training before they may begin work on client projects.

Panel owners are required to inform panelists that any personal information gathered is kept strictly confidential and is never passed onto a third party without the panelist's permission, and that all information is used for market research only and that panelists can opt-out at any time.

In addition, we consult with and advise clients about questionnaire design, sampling considerations, and data collection strategies. At the client's request, we carefully review questionnaires to ensure they are online-ready, respondent-friendly, and logically accurate. We closely monitor response levels, drop-out rates, and panelist feedback to make sure that the survey meets performance expectations.

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?

OrangeMR conducts online surveys with children and young people on behalf of its clients. If a client requests to interview a child aged 8 years or older directly, the process for permission requires that the child provide a parent's email address for notification and allow the parent to opt the child out of participating before registration with our panel can be completed. OrangeMR does not currently offer direct access interviews with children under age 8 from internal panels, but in cases where vendors are used for this demographic, consent by parents must be collected by the vendor (phone, fax or email) prior to allowing the child to register for that panel. OrangeMR complies with all applicable laws and regulations with respect to conducting surveys with children, only performing online surveys with children and young people after receiving parental consent.