qualtrics

ESOMAR 28

28 QUESTIONS TO HELP RESEARCH BUYERS OF ONLINE SAMPLES

Updated: 6/20/14

sophisticated research made simple

Introduction

Welcome to the Qualtrics ESOMAR 28 Questions! These questions are meant to provide transparency into the online sample process and associated practices. We want to make sure that researchers understand the opportunities and limitations of samples so expectations are established and needs are met.

There has been a recent shift away from relying on a single panel. Instead, the trend is to build samples from multiples sources. These new questions, a replacement for ESOMAR's "26 Questions to Help Research Buyers of Online Samples," were designed in recognition of this trend.

As a panel aggregator, Qualtrics has helped clients complete hundreds of projects around the world through both it's online samples and it's sophisticated research technology. The new questions included in this ESOMAR have been added in recognition of the new techniques and technology that have been developed in the field of online sampling.

For supplemental information, ESOMAR provides a Guideline for Online Research that addresses best practices in handling ethical, methodological, and regulatory issues, and the legalities regarding technology in research.

qualtrics

Company Profile

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

   Qualtrics, the world's leading enterprise survey technology solution, has been providing online samples for over five years. Qualtrics partners with over 20 online panel providers to supply a network of diverse, quality respondents to our worldwide client base. Our Qualtrics Panels Team has completed over 15,000 projects across every industry vertical including travel, financial services, healthcare, retail, consumer goods, technology, and manufacturing both in the US and globally.

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?

   The majority of our samples come from traditional, actively managed market research panels. While this is our preferred method, social media is also used to gather respondents. Upon client request we can access other sources if it meets the needs of a specific target group.

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?

   As an online market research sample aggregator, Qualtrics maintains the highest quality by using Grand Mean certified sample partners. To exclude duplication and ensure validity, Qualtrics checks every IP address and uses a sophisticated digital fingerprinting technology. In addition, every strategic panel partner uses deduplication technology to provide the most reliable results and retain the integrity of the survey data.

4. If the sample source is a panel or database, is the panel or database used solely for market research? If not, please explain.

   Qualtrics' panels are for market research only.

panelsales@qualtrics.com | 801.709.2164   qualtrics

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

For hard-to-reach groups, Qualtrics utilizes niche panels brought about through specialized recruitment campaigns. Hundreds of profiling attributes are included in our panels to guarantee accurate and detailed knowledge of every potential respondent. We are regularly adding new specialized panels and working with our partners to increase their profiling capabilities.

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?

Qualtrics leverages multiple sample sources to best fit our clients' needs. As a panel aggregator, our clients are aware that we are leveraging third-party panels. We ensure that all panel partners employ continuous monitoring and quality control checks. After working in a broad array of industries over many years, Qualtrics has built and maintains solid relationships with the largest and most well-known panel providers in the world.

Sampling & Project Management

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

Qualtrics panel partners randomly select respondents for surveys where respondents are highly likely to qualify. Certain exclusions take place including category exclusions, participation frequency and so on. Each sample from the panel base is proportioned to the general population and then randomized before the survey is deployed. We work to guarantee that the population surveyed meets the requirements of the specific survey as defined by our clients' needs.

8. Do you employ a survey router?

To provide the best experience for our clients, Qualtrics leverages partners' routers to meet specific clients' needs. By leveraging others' routers rather than employing our own, Qualtrics is able to charge less given increased incidence rates and decreased costs.

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

When necessary, Qualtrics leverages a router from one of our sample partners. All sample partners redirect members by matching qualifying demographic information from their profiles to a specific survey. All processes related to the routers are completely randomized to avoid source bias.

qualtrics

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?

Qualtrics employs a router for clients' studies when pretargeting is required. The routers that are leveraged are completely randomized without prioritization or weighting to avoid potential self-selection bias caused by invitation wording, survey topic, or reward offerings.

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?

Our panel partners each have a team dedicated to monitoring and setting the parameters of the router.

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?

Qualtrics panel partners maintain a wide variety of personal profiles on respondents including automotive, beauty, finance, home and family, internet, media, shopping, sports, travel, B2B, and so on. The panels in our network hold full psycho-demographic profiles, and each panelist can enter or update their information during registration and upon sign-in. To ensure profiles are consistently updated, our network of panels sets an expiration date for each profiling question.

13. Explain how people are invited to take part in a survey. What does a typical invitation look like?

Potential respondents are sent an email invitation informing them that the survey is for research purposes only, how long the survey is expected to take and what incentives are available. Members may unsubscribe at any time. To avoid self-selection bias, the survey invitation does not include specific details about the contents of the survey.

14. Please describe the nature of your incentive system(s). How does this vary by length of interview, respondent characteristics, or other factors you may consider?

Qualtrics respondents will receive an incentive based on the length of the survey, their specific panelist profile and target acquisition difficulty. The specific type of rewards vary and may include cash, airline miles, gift cards, redeemable points, sweepstakes entrance and vouchers.

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

Qualtrics requests the following from every client: description of target audience, desired sample size, expected survey length, and all screening criteria. After project expectations are clarified with the prospective client, Qualtrics will give an estimate on the timeline for desired deliverables.

qualtrics

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

All Qualtrics panel partners measure respondent satisfaction through periodic satisfaction surveys and project feedback surveys. This is done to learn how to best maintain quality panels with high response rates. Aggregate satisfaction scores are made available to all clients.

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

If the client requests a breakdown of response rates, incidence rates, click rates, or so on, notice must be given to Qualtrics within the first two weeks of the project. If notice is given within that timeline, Qualtrics will incorporate the desired aspects into the project. Upon request, Qualtrics can assist in the analysis of the data, otherwise our clients analyze the provided information independently.

Data Quality & Validation

18. Who is responsible for data quality checks? If it is you, do you have procedures in place to reduce or eliminate undesired within survey behaviors, 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.

Qualtrics is committed to providing the highest quality data to our clients. We ensure quality by offering options for additional attention checks which guarantee that respondents are carefully taking the survey. Qualtrics will replace respondents who straight-line through surveys or finish in less than ⅓ of the average survey completion length. Within 14 days of survey completion, our clients have the opportunity to review the results and come back to our Project Managers with any responses that need to be replaced due to quality issues. If the client prefers to incorporate additional quality checks, the Qualtrics Project Manager and Sales Representative must be informed so the proper logic may be added to the survey project.

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?

Qualtrics partners with the largest panel providers to ensure depth and breadth of reach. Each of our strategic panel partners have completion and invitation limits. Our partners ensure that respondents are not over contacted by keeping records of participation history. Specific information is available upon request on a project-by-project basis.

 qualtrics

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?

Each of our strategic panel partners closely monitors the sample stream and panelist activity records to maintain consistency. The specific completion and invitation limits vary per sample source, but every panel partner has incorporated limits on a weekly, monthly, or lifetime basis. Specific information is available upon request on a project-by-project basis.

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?

Qualtrics' panel partners maintain participant history while Qualtrics maintains all survey responses in our database. On a project-by-project basis, Qualtrics keeps track of specific respondent information such as response rate, abandonment rate, and so on. This information is available to the client upon request.

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?

Qualtrics has full confidence in its partners and relies on each panel provider to confirm respondent identity. Each panel has its own confirmation procedures including, but not limited to: TrueSample, Verity, SmartSample, USPS verification, and digital fingerprinting. All panel partners verify respondent address, demographic information, and email address.

Policies & Compliance

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

The 'opt-in for market research' process requires respondents to submit an initial registration form requesting to participate in market research studies. Potential respondents build their profile from a standardized list of questions. The panels then use the profiles to select studies that would best fit the case specifications. All of Qualtrics' panels have a double opt-in requirement. Those who do not reconfirm will not be contacted to participate in a survey.

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

As an aggregator of panels, Qualtrics provides the privacy policy of each panel provider upon request. Qualtrics ensures that every panel we associate with adheres to all state, regional, and federal laws. Our partners are members of ESOMAR, CASRO and other national organizations.

qualtrics

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

Qualtrics' database does not hold sensitive or confidential panelist information, however we do hold all survey responses in our data centers. Our data centers utilize many security measures. Qualtrics' database access is restricted and requires authorization. All computer equipment (servers, SANs, switches, routers, etc.) is redundant and is located in secure, environmentally controlled data centers with 24/7 monitoring. Web traffic does not directly access the database and database requests are reversed proxy via an application server to the database. All information is secured via industry standard firewalls and stringent IT security policies and procedures. We utilize industry standard web application firewalls and DDOS protection. Also, single sign-on two-factor authentication is available to customers as an option for managing panel users. Qualtrics also leverages panel partners who are meticulous in their multiple levels of security that include: redundant data centers, secure servers, encryption which includes one-way encryption, numeric IDs, secure .NET platforms, security clearance, industry standard firewalls, 24/7 monitoring of data centers, confidentiality agreements, and physical, electronic, and managerial procedures.

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?

In every circumstance, we make sure our client is comfortable with the sensitivity of the information that will be presented to panelists. Panelists agree in advance that they maintain complete confidentiality with any information they are presented. Our partner panel providers leverage strict confidentiality programs incorporating tools that do things such as disabling screenshots and circumventing the saving of images, video, or audio files. In addition, the forwarding function, copy-pasting, and web-browser storage can be disabled.

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

Our panel partners are certified through a variety of quality systems, but all maintain specific certifications or rigorous in-field monitoring and data quality checks. Quality system certifications and programs include: ISO 20252 management system standards, Mktg Inc., Media Ratings Council, and various internal tools and methods.

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?

Qualtrics does help conduct panels for online surveys of children or young people. All panels adhere to the ESOMAR standards, COPPA requirements, and UE "Safer Internet Programme" guidelines. The specific age of child requiring parental permission varies by country, but for any child under the age of 13 parental consent is absolutely required.

panelsales@qualtrics.com | 801.709.2164   **qualtrics**