ESOMAR 28
QUESTIONS TO HELP BUYERS
OF ONLINE RESEARCH 2021

QUEST
MINDSHARE

✛ *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 recognises 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.

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?

Quest Mindshare, a division of Quest Global Research Group, established its online presence in 2003 when managing partners Greg Matheson and Joe Farrell needed services for their technology clients and corporations across North America. The panel was built chiefly off the back of CATI projects that looped through Quest's extensive call centre network. The result was a deeply engaged and credible online audience that has grown with Mindshare and is deemed to have among the highest response rates, ranging across 25 different industries globally. Headquartered out of Toronto Canada, Quest combines expertise for custom solutions via a robust, proprietary sampling platform with an eye to quality insights.

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.

Quest continuously leverages a variety of sources and channels to recruit and engage panellists.

Quest also builds many 'recruit to fit' panels to meet client specific needs.

The actively managed global proprietary panel is Mindshare (www.questmindshare.com).

Respondents are uniquely rewarded with cash-based incentives (cheque, PayPal and Tango Card). This individual-compensation model, coupled with respondent care, contributes to Mindshare's average response rate of 12%, more than double the industry average.

Internal assets are supplemented with recruit-campaigns focused on high-demand, niche audiences.

Quest maintains partnerships across the industry with like-minded, quality-only companies to deliver hard-to reach audiences and speed up fielding windows.

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.

Quest's intuitive proprietary project-management software, Quest Titan, seamlessly integrates all sources and global channels for targeting audiences. Sampling methodology involves the use of Relevant ID digital fingerprinting technology to identify potential fraudulent respondents and remove them prior to delivery or in the moment routing.

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.

Quest prides itself on being a hard-to-reach expert. It's simple: we have real people finding real people. Quest's extensive network of offline databases, coupled with a strong background in CATI research, gives it the tools to access hard to reach universes with relative ease.

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.

The Quest Mindshare panel is used solely for market research purposes.

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.

Quest's Titan can draw from any vetted source in the online market. Quest does not work with broker level, sub optimal sample sources. Quest only works with the best in the industry and only allows the Mindshare panel to be utilized in reciprocation with quality organizations. Due to the reciprocal nature of Quest Mindshare and our partners, pricing differences or adjustments are never a burden of the client or sponsor of any particular survey.

SAMPLING AND 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.

Quest understands online balancing against census data, providing guidance to clients on sampling strategies/setting quotas.

Based on the demographics represented within the respondent base, project management teams put together sample sends that fit clients balancing needs.

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.

Quest uses a purpose built router as part of its sampling platform with an eye towards respondent experience and best fit.

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.

Quest's Router and Traffic optimizing technology is primarily geared towards respondent experience. If an applicable survey is available that meets a respondent's profile, they may be given the opportunity to participate. Algorithms take into account saturation, topic, fit and randomization when determining whether a respondent may have an opportunity to route to another survey. Respondent time and usage considerations are significant factors.

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.

Volume of opportunity and topic of opportunity is important when mitigating bias. Part of Quest's algorithm is determining survey topic and fit. While Quest does have many niche based respondents – things like Tech Specific Panels, Music Listeners, etc., it is important to ensure routing to non correlated research. We have seen no discernible difference in respondents regarding bias from router or non router achieved data through the Quest Mindshare system.

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?

Router parameters were set up by Quest's initial team of technical experts and continues to be improved upon to combat biases.

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?

Quest Mindshare has a robust, detailed profile database of all respondents. While respondents are required to share basic demographic data, business and workplace characteristics, they are routinely encouraged to offer health and shopping preferences, hobbies/lifestyles, product ownership, media consumption, auto ownership, travel and shopping habits.

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.

Quest Mindshare's invitation process starts with one of many fully customizable email templates, adjusted with content and look/feel based on the nature of the study and targeted audience. Generic Titling and respondent expectations are outlined in the invitation.

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.

Quest Mindshare Respondents are offered premium rewards – panellists can choose between cash, check, Paypal or Tango cards as incentives for their participation. There are a wide variety of factors that determine incentive levels. Considerations are given to LOI, B2B Specifics (for business type respondents), subject sensitivities and respondent contribution requirements.

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.

As much information as possible, but the minimum specifications like Incidence Rate, Length of Interview and general respondent demographics are required. Quest also works closely to help their client understand actual Incidence Rates as they relate to online research universes.

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 selfreported feedback or from an analysis of suspend points might be very valuable to help understand survey results.

Respondent satisfaction is measured for individual respondents and for overall survey satisfaction. Information is available for each survey upon request. Individual survey takers are also routinely encouraged to provide feedback upon completion. As a standard practise, all respondents have 24-7 support services available from Quest's Experience Management team.

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.

Quest systems give clients full transparency and access to all respondent and project data on a real time basis through portals or PM updates.

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.

Quality and assurance standards maintained at Quest include both automated and manual processes. Quest Titan Automates Geo Blocking/Cookie tracking as well as BOT smashing tools followed by a True Sample © Score exchange. Quest's QA team uses a wide variety of tools, including but not limited to: Checking IP/Location, Straight-lining, Speeding, Red Herring Question deployment, Open End Vetting, Data Call Back.

Quest employs a variety of data quality processes, both technical and manual. Quest has developed proprietary technical applications that digitally analyse respondents upon entry to remove bots and undesirable respondents as well as analyse respondents through a True Sample © transaction. Mid project and post project QA processes are in place to remove further undesirables. Quest programs and manages tens of thousands or online research projects per year and the QA team is well versed on a variety of techniques to catch undesirable respondents.

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.

Invite contact restrictions depend on the Mindshare Panel. Quest USA Genpop has a 24 hour resting period. Quest UK Genpop has a 48 hour resting period. Quest B2B USA has a 72 hour resting period, and so on. There are over 30 different panels within the Mindshare complex. Contact your Mindshare rep for more information.

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.

General resting periods are 24 hours, however, project management has flexibility within that that framework on a project to project basis. B2B niche panels have resting periods of anywhere from 2 to 5 business days.

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 was selected and drawn, may increase the possibilities for analysis of data quality.

We maintain complete historical data on all of our panellists, including recruitment source, panel sign-up date, and survey participation and incentive redemption records. We provide nonpersonally identifiable information to clients 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?

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

Quest has technologies in place that identify fraudulent respondents at multiple levels in the recruitment and field process. At registration, we employ a proprietary algorithm based on IP checking and other device-level information that provides a fraud score that we use to screen out suspicious applicants. Once a respondent joins our panel, a quality score is calculated for every respondent utilizing True Sample ©. This scoring algorithm is based on multiple factors, including survey-taking frequency, response patterns, number of screen-outs on demographic questions, and surges in activity. When a panellist does not meet our minimum threshold, they are removed from the database. At the survey level, we utilize Relevant ID technology to identify potentially fraudulent respondents based on their real-time information, as well as their overall fraud score stored in the central database.

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 adistinction 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).

We employ both single and double opt-in procedures for our panel recruitment. The type of optin varies by recruitment source. All respondents are able to opt out of our panel at any time.

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.

https://www.questmindshare.com/privacy-policy

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

Our system is based on the .NET platform which provides a large number of built-in data security technologies. Beyond this, all of our respondent-level identifiers are encrypted to ensure no stored personal data is available during the data collection process. In addition, our network and databases are accessible only through password-protected security keys and logins.

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.

Surveys containing commercially-sensitive content typically require respondents to agree that they will not discuss, copy, or sell any information gained as a result of their participation in the survey. Quest can advise clients on how best to protect/collect sensitive information.

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.

Quest utilizes True Sample © certified respondents.

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.

While the vast majority of our surveys are conducted among adults, The Quest panel can provide access to children and/or teen respondents with parental/guardian permission. In these cases, we adhere to both the ICC/ESOMAR International Code and the Children's Online Privacy Act (COPPA) where most surveys will be adult/guardian assisted.