

# ESOMAR 28



# COMPANY PROFILE

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

Since its inception in 2008, Sample Strategies has long-standing experience providing online samples for market research. Sample Strategies carefully managed access panels with reach in diverse geographies are nurtured for market research purposes only. Sample Strategies has completed nearly 1500 research projects. Sample Strategies has proprietary online panels in 19 countries covering North America, Europe, APAC & more.

## SAMPLE SOURCES AND RECRUITMENT

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

Sample Strategies online panels are a community of high-quality, highly profiled, double opted-in consumers and specialty panelists. They are managed actively by our automated systems and panel team to serve the sample needs of our clients. Sample Strategies has its own proprietary panels providing access to more than 3,000,000 respondents around the world. In addition to our consumer panels, Sample Strategies maintains B2B panels with over 500K business professionals. These include ITDM's, "C" level executives, Small and Medium Business owners, and more. Please note that when we quote panel members, they are active survey respondents who have registered with the panel and have taken a survey in the last 6 months.

We recruit from wide variety of sources including local web sites, affiliate networks, banner and text advertisements, e-mail providers, search engines, customer loyalty web portals, SEO's, internal referral networks, permission based networks, and more.

We consistently work towards nurturing our panels and provide cash incentives to everyone who participates. In addition, we constantly work to improve the design and appearance of survey invites and questionnaires to ensure the best possible experience to panelist. Sample Strategies | Confidential.

**If you provide more than one type of sample 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?**

In the majority of cases we will not blend sample in markets where we maintain proprietary panels. When a partner is required, all sample will run through a central hub, designed by Sample Strategies to provide a digital fingerprint. This effectively eliminates those respondents who have already accessed the survey from another source. As Sample Strategies only uses proprietary panel for its sampling, we are able to pull and replicate sample for each deployment as required. Many of our customers require census representation on the “click through” or at a minimum, in the final data set. Our sample deployment tool is highly flexible and allows for easy and accurate sample blending to meet the client’s needs while ensuring duplication doesn’t occur.

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

Sample Strategies panels are used only for Market Research purposes.

**How do you source groups that may be hard-to-reach on the Internet?**

Sample Strategies offers a variety of panels for hard-to-reach demographics like IT professionals, gamers, business owners, luxury car owners, etc. Sample Strategies panelists are recruited from multiple and diverse sources which include targeted email lists, major publishers, referrals, and more. Each country has its own recruitment plan based on the local culture. What works in one area will require changes or a completely different methodology in another. Our local knowledge is what makes the difference.

In-depth profiling our respondents on more than 500 data points ensures easy targeting and speedy field times. Through this profiling, we build numerous sub-panels including a full B2B profile, Auto, Teen, Mobile, Ailments, and more. The depth of our profiling is Sample Strategies single biggest advantage.

**If, on a particular project, you need to supplement your samples with samples 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?**

Our partners are carefully screened before becoming a part of the Sample Strategies panel network. We believe that sample taken from several high-quality sources can be highly effective if done properly. Before taking on a partner, we will carefully research their credentials, take references, and run a full analysis of their panel recruitment, management, and incentive system. Once they pass the required criteria the vendor becomes a member of our preferred partner network. Of course, open communication with clients regarding achievable sample is a company priority. When responding to an RFP we will let our client know what we can do internally and what would come from our partners. Clients are always consulted when using third party suppliers.

## SAMPLING AND PROJECT MANAGEMENT

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

Sample Strategies draws sample for each survey in accordance with the study specifications. Our respondent's data points act as filters, allowing us to reach the right people for the right survey. With internal tracking tools, we know the exact response rate by demographic variable. This allows for highly accurate sample deployment; census balancing to "click through" is a frequent request that we can easily accommodate. Panel members are selected randomly by the system based on the selection criteria for that particular survey. Our sample can be deployed in batches and is most frequently spread out over a period of several days, dependent on the project schedule. With 24 hour coverage, sample deployment can be tailored to the specific needs of our client.

**Do you employ a survey router?**

No.

**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?**

Not applicable.

**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?**

Not applicable.

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

Not applicable

**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?**

Sample Strategies panels undergo extensive profiling exercises and we record data on numerous profile questions ranging from personal and household demographics, employment characteristics, internet characteristics and many more. Members are asked to update their profiles on a consistent and sustained basis. In doing so, we increase the probability that survey invitations will result in a qualified respondent for the study. The depth of our profiling helps many low incidence studies become feasible.

**Please describe your survey invitation process. What is the proposition 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.**

In addition to sending survey invites through email, we also serve up invitations directly to the respondent's account homepage. In exchange for their time and opinions, panel members receive cash rewards. We never offer sweepstakes or points.

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

Sample Strategies offers cash incentives only. Incentive amount is based on audience, length of interview and incidence rate.

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

- Target audience
- Length of interview
- Incidence among targeted audience
- Quota specifications
- Project timelines

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

Yes, respondents are always given the opportunity to share their opinions and thoughts about the survey that they participated in. This is made available to clients on request.

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

Sample Strategies measures customer satisfaction for each project. This is done by sending a brief questionnaire covering overall satisfaction, likelihood of future work, responsiveness of account manager, sales executive, sampling, sample quality and likelihood of recommending our services to another client. In addition, after each study a de-brief conference call is requested to get a better understanding of their overall satisfaction with our performance. What did we do well, any areas for improvement, etc.?

# DATA QUALITY AND VALIDATION

**Who is responsible for data quality checks? If it is you, do you have in place procedures 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.**

Sample Strategies employs rigorous quality checks as standard operating procedure across data collection, survey set up, implementation and reporting. Sample Strategies respondents can only respond to a survey once and survey invitations are deployed by default to fresh sample.

Any panel member found to be providing invalid/low quality responses can be at risk of termination from the Sample Strategies panel. This includes restrictions on future participation.

The following steps are taken to ensure the integrity of our client's data.

- Continuous profiling exercises are held and strict background checks are done to ensure that there is consistency in data provided by respondents.
- Any inconsistencies resulting from incorrect information shared by our respondents would lead to termination of their accounts.
- Use of CAPTCHA technology to prevent machine bots and scripts being part of panels.
- Elimination of speeders and straight-liners.
- Removal of fraudulent responses at registration and removals of respondents with suspicious domains.
- Clients can include verification questions in the survey to eliminate fake responders.

**What limits, if any, do you place on solicitation for surveys i.e. how often can any individual be contacted to take part in a survey whether they respond to the contact or not? How does this vary across your sample sources?**

Sample Strategies permits a respondent to finish a maximum of 4 surveys per month with no more than 1 survey per week. These are standard procedures and remain consistent, irrespective of sample type. Any given respondent can receive a maximum of 3 invitations weekly to participate in survey research. Once they respond, they are locked out from receiving further invites for one week. Reminders are included in this calculation.

**What limits, if any, do you place on survey participation i.e. how often can any individual take part in a survey? How does this vary across your sample sources? How do you manage this within categories and/or time periods?**

Sample Strategies permits a respondent to finish a maximum of 4 surveys per month with no more than 1 survey per week. We keep panelist participation history records and our system automatically puts limits on survey frequency. We can exclude or specifically target respondents for multiple wave projects, tracking studies, or similar studies.

**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 per job analysis of such individual level data?**

Yes, we maintain detailed information on each panelist. Information that we keep on file:

- Survey start date
- Date, time, IP address and unique respondent ids when survey is started
- Survey complete date
- Complete, screen out, quota full and incomplete ids for each survey
- Length of survey

After each project is finished, our client is briefed on incidence, number of completes, and average survey length. Of course, we can accommodate the need for additional information as required.



**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 or at the point of entry to a survey or router. If you offer B2B samples what are the procedures there, if any? Do you de-duplicate the sample when using multiple sample providers?**

Multiple criteria are used to identify fraudulent respondents at the time of registration and on a continuous basis. Regular profiling surveys are provided to respondents. We regularly track response patterns and of course eliminate speeders and straight-liners after doing background and participation checks. Blacklisted respondents are disabled and they cannot join again.

Panel members who do not provide valid data in key data fields during recruitment are not invited to participate in surveys until their credibility is confirmed. We run rounds of follow up with these respondents to ensure that only genuine respondents are a part of our panel.

We remove all duplicates from the system by reviewing contact variables during registration and again in the incentive redemption process. Our proprietary security program (CAPTCHA) ensures the validity of potential panelists during the registration process and again when they are taking surveys. Yes, we de-duplicate sample while using multiple sample providers.  
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## POLICIES AND COMPLIANCE

**Please describe they're 'opt-in for market research' processes for all your online sample sources.**

For validity of respondents and quality purposes, we use the double opt-in methodology to recruit our panel members.

**Step 1:** Respondents need to complete a registration survey which is a detailed online registration form.

**Step 2:** Respondents who fill the form then have to click on an activation link which is sent to them through email immediately after registration.

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

Privacy policy is displayed at the time of registration. Respondents, who agree, read and understand these policies are permitted to become our members. Link to our privacy policy is below.

<http://www.sampstrategies.com/privacy.php>

Sample Strategies fully operates within the local and national laws within all markets where operations are undertaken. Sample Strategies requires all clients to adhere to the same standard of accepted behavior when undertaking any activity using our panel.

Sample Strategies adheres to, and exceeds minimum standards with respect to privacy, data protection, and child safety in all markets in which operations are conducted. Sample Strategies follows ESOMAR and other industry body guidelines with respect to these issues.

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

Sample Strategies data is stored, protected, and backed up on servers within a private security facility. Back up's are taken on regular basis and security is applied at all stages.

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

When a study presents commercially sensitive data, we will frequently ask respondents to opt-in to a formal confidentiality agreement. In addition, we are able to restrict use of certain technology, limiting the risk of a respondent being able to capture and share this sensitive data. In some cases, our recommendation will be to not take a particular study online due to the inherent risks.

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

We have not applied for admittance into any specific quality system. This is being strongly considered for the immediate future and updates will be provided.

**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?**


In most countries, individuals must be 18 years old to participate in research surveys, which is in accordance to ESOMAR guidelines. We do have profile data collected with questions about children and if respondents have children, then we ask about child age and gender. In the United States, a child of 12 years of age can independently take market research surveys. All laws are followed on a local basis. For most child oriented surveys, a parent must be present while the child takes the survey.


Sample Strategies can specifically target parents of children to conduct research with parental permission.

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