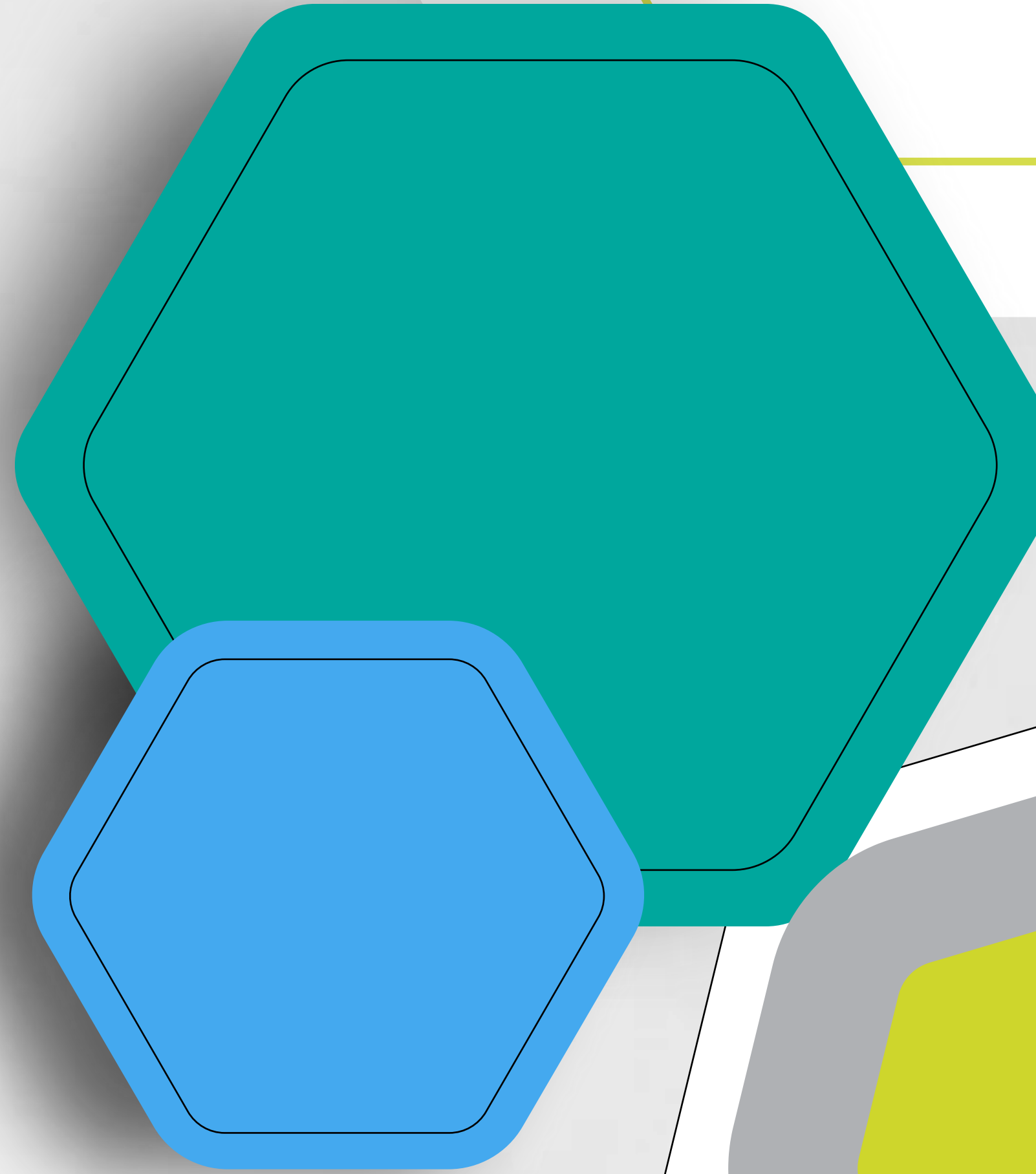


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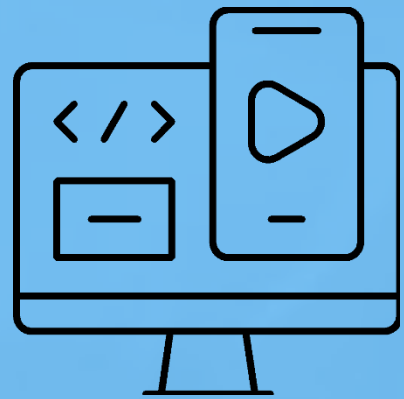
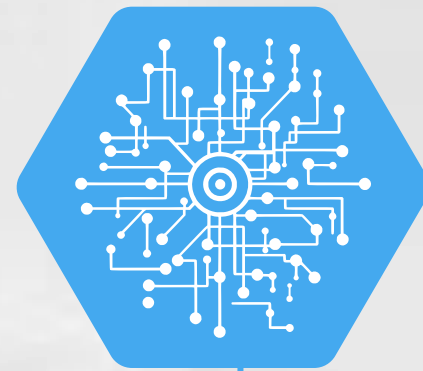


The Sampling Ecosystem & Novel Recruiting Methods

- **Understanding the Sampling Ecosystem**
 - Tia Maurer, Procter & Gamble
 - Brad Franz, Burke
- **How to Effectively Recruit Hispanic Audiences: Moving Beyond Acculturation**
 - Maria Parra, Ingenium Research
- **From Social To Scientific: How Relationship-Based Recruiting Transformed Health Tech Testing**
 - Kayte Hamilton, The Social Question
 - Brooke Bower, Root Research

The Sampling Ecosystem

- Sampling evolution: Proprietary research panels to sample exchanges and monetizing online traffic.
- Efforts to reduce costs driven by increased automation and efficiency
- Research process /Data collection supply companies, & techniques are fragmented → lack of transparency, control, and options for buyers.
- Increased risk of fraud in the participant ecosystem
- Less focus on the participant experience throughout the survey process



Common Sample Sources Available Online



Research Panel

A proprietary, branded community. Participants join and have a direct relationship with the panel, not through a third party, specifically for market research, and engage in various research activities over time.

The sample provider manages an incentive program where participants earn points that can be redeemed for items or cash.

Personally identifiable information (PII) is often collected for validation.

Loyalty/Rewards Community

Members complete various tasks in exchange for rewards. Members join the community with the expectation of a continued relationship with the community brand.

The key difference in this source-type versus traditional research panels is that these members engage in activities beyond just market or survey research.

Affiliates/Publishers

Website or app owner who earns commissions by monetizing traffic to surveys through affiliate marketing ads, links, banners, and intercept opportunities.

Affiliates can be individuals or networks of sites.

Sample companies integrate their systems into external web or mobile app communities to monetize traffic.

River/Intercept

Early online research approach, now less common due to the rise of Affiliates and Publishers, involved intercepting potential participants through pop-ups or site-based ads and inviting them to take surveys.

Databases/Targeted Lists

A list of potential market research participants who have provided their consent for market research.

Accessing & Managing Online Sources



Direct

Buyer interacts directly with proprietary sample owners.

Sample can be delivered through manual processes, automated means or via DIY portal.

It is expected that the supplier will only provide participants from their own assets and provide confirmation that will not outsource.

Marketplace / Sample Exchange

Platform that connects buyers with multiple suppliers in one place, facilitating automated delivery of participants to surveys.

Buyers can interact with the platform either through automated means or a DIY portal.

Sample exchanges don't own the participants; incentivization is handled by the original source.

They offer various types of sources, including proprietary panels, loyalty panels, affiliate networks, and single publishers

Managed Network

Research panel owners use a network of outsourced suppliers, including Sample Exchanges, to fulfill sample requirements.

Unlike Sample Exchanges, which don't own participants, network management optimizes traffic towards their proprietary research panels.

Some suppliers integrate other sources seamlessly, making it less apparent where the sample originates.

Source Agency

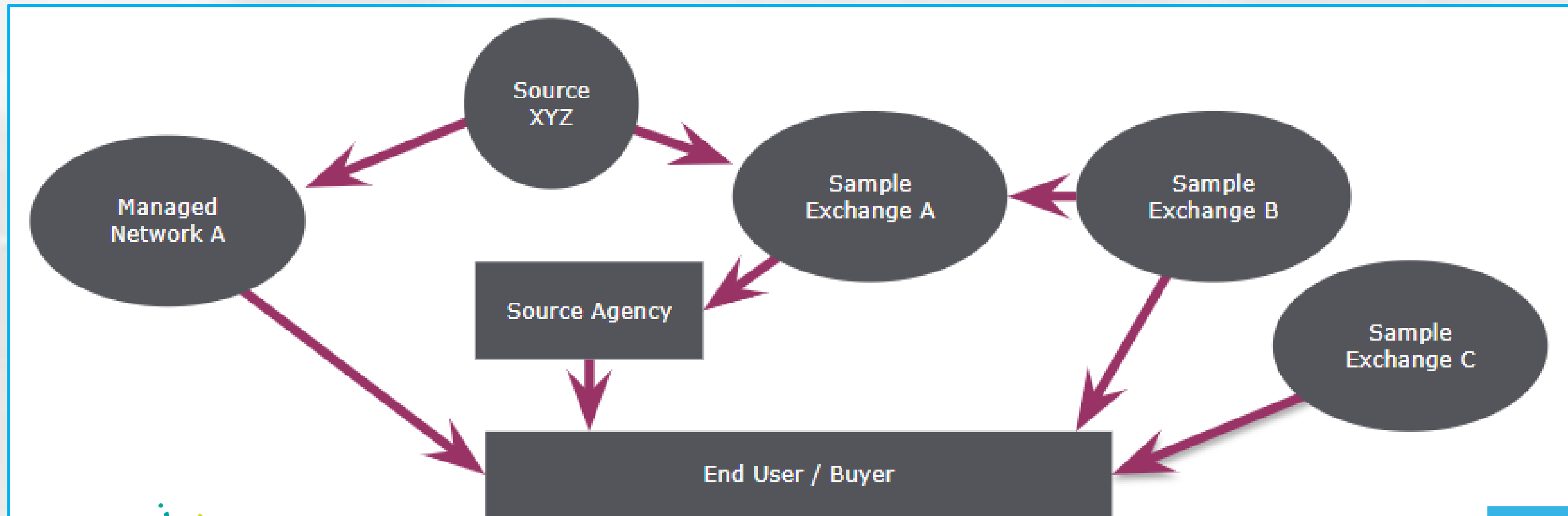
Similar to a managed network, but the supplier manually handles all sample source and sub-source tasks.

There is likely minimal automated process in place for feasibility, costing, and sample ordering for assets that are not owned.

Aggregation Example from MRS audit



- There was a review of a survey with a high percentage of quality issues.
- The end user buyer was not aware or provided information from any of the 4 suppliers on what sources / sub-sources were being used.
- There were fraud-related quality issues with all 4 suppliers.
- The source agency did not inform the buyer that they had outsourced all the sample to a Sample Exchange.
- The source agency – and therefore the end user - was also not aware that sample exchange B was feeding into Sample Exchange A.
- The end buyer was using Sample Exchange B directly.
- The end user was not clear that the managed network was outsourcing some of the participants and thought they were using a proprietary panel for the all sample.



Considerations and Trade-Offs

- Quality is the responsibility of everyone in the research process
 - Sample frame considerations
 - Survey Design and Functionality
 - Respondent Experience
- Source Transparency
 - Understand where participants originate and how they engage with surveys.
 - This transparency is crucial for assessing the impact on data reliability and quality.
- Understand the sourcing implications on the research objective
 - Feasibility and pricing
 - Implications of LOI and incidence