ESOMAR 37 Questions

COMPANY PROFILE

1. **What experience does your company have in providing online samples for market research? How long have you been providing this service? Do you also provide similar services for other uses such as direct marketing? If so, what proportion of your work is for market research?**

   QRS has been in the business since 1975 and as one of the longest established independent data collection providers in the UK, we know the industry inside out. Our panels have evolved since 2018 and are only used as an internal resource.

   With a focus on quality online data, QRS undertakes in excess of 50,000 surveys per annum. We have an enviable reputation for conducting: customer satisfaction & experience, brand awareness & evaluation, proof of concept, tracking surveys, hard to reach & niche participants, offline and online qualitative studies (OLFG, Bulletin Boards, Mobile Ethnography), recruitment and management of online communities.

   Kaboodle MR and QRS Professionals Community are established online panels, managed by QRS Market Research, giving access to participants for focus group discussions, interviews, product testing, mystery shopping and other research studies.

   100% of QRS's work is market research.

2. **Do you have staff with responsibility for developing and monitoring the performance of the sampling algorithms and related automated functions who also have knowledge and experience in this area? What sort of training in sampling techniques do you provide to your frontline staff?**

   QRS does not deploy sampling algorithms. All sampling is done manually by a team of project managers and execs. All staff working on online samples and sampling are given internal and Market Research Society training on best practices in sampling and management of online panels.

   QRS continually refreshes staff on best practices and procedures regarding online sampling.

3. **What other services do you offer? Do you cover sample-only, or do you offer a broad range of data collection and analysis services?**

   QRS offer a variety of data collection services/methodologies including, but not limited to:
   - Face to Face
   - Telephone
   - Qualitative
   - Online
   - IVR & SMS
   - Data Processing
   - Mystery Shopping
   - Research Design and Analysis

SAMPLE SOURCES AND RECRUITMENT

4. **From what sources of online sample do you derive participants?**

   QRS sources participants from our panels in the first instance. We also source sample from trusted partners as well as conducting many projects using client-supplied data lists for projects such as employee surveys or customer satisfaction surveys.

5. **Which of these sources are proprietary or exclusive and what is the percent share of each in the total sample provided to a buyer?**

   The members of QRS's database are proprietary. In some cases, we will require sample contributions from external sources. To maintain data integrity, QRS has a stringent supplier acceptance process, where we carefully select and vet these sample sources to support us.

6. **What recruitment channels are you using for each of the sources you have described? Is the recruitment process 'open to all' or by invitation only? Are you using probabilistic methods? Are you using affiliate networks and referral programs and in what proportions? How does your use of these channels vary by geography?**

   The primary source for QRS Business Professionals panellists is individuals who have taken part in B2B telephone market research surveys and have opted in to join the panel on the back of the research. We believe this focussed source of recruitment sets us apart, as we know that these panellists are genuine businesspeople who are engaged in the research process.

   To further build our network of professionals, we also offer an incentivised referral scheme, which encourages our panellists to recommend like-minded colleagues or contacts to register. The referral contacts are subject to rigorous validation checks, alongside their referees (discussed below).

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   Recruitment is 'open to all' and we currently do not use probabilistic methods or referral programs. As Kaboodle-MR is a UK-only panel, the channels only apply to one geographic region.

7. **What form of validation do you use in recruitment to ensure that participants are real, unique, and are who they say they are?**

   The primary source for QRS Business Professionals panellists is individuals who have taken part in B2B telephone market research surveys and have opted in to join the panel on the back of the research. We believe this focussed source of recruitment sets us apart, as we know that these panellists are genuine businesspeople who are engaged in the research process.

   We validate panellists on an ongoing basis, with checks on IP address (where consent is obtained) and matching their survey data against their registration data. We also include

trap questions to reduce bot inclusion. Statistics on quality removal can be provided on a project level, by request.

8. **What brand (domain) and/or app are you using with proprietary sources?**
QRS Professionals Community is accessed via our member website, https://qrs-research.com, and email invites.

Kaboodle is accessed via our member website, https://kaboodle-mr.com/, and email invites.

9. **Which model(s) do you offer to deliver sample? Managed service, self-serve, or API integration?**

QRS only offers a managed service to deliver sample, with director-led project management a key feature of our service.

10. **If offering intercepts, or providing access to more than one source, what level of transparency do you offer over the composition of your sample (sample sources, sample providers included in the blend). Do you let buyers control which sources of sample to include in their projects, and if so how? Do you have any integration mechanisms with third-party sources offered?**

Our ISO 20252 certification requires us to be completely transparent about the composition of our sample. Should that involve supplemental suppliers, we partner only with those that go through our stringent supplier acceptance process, where we carefully select and vet these suppliers to support us. QRS discuss sample sources with clients at the outset of a project, and if another source is required during field, we are transparent about the nature of the source. Buyers can offer suggestions about sample sources, but all suppliers have to be vetted and accepted by QRS.

11. **Of the sample sources you have available, how would you describe the suitability of each for different research applications? For example, Is there sample suitable for product testing or other recruit/recall situations where the buyer may need to go back again to the same sample? Is the sample suitable for shorter or longer questionnaires? For mobile-only or desktop only questionnaires? Is it suitable to recruit for communities? For online focus groups?**

QRS Professionals Community is a panel of UK business professionals, and therefore is suitable for B2B research. Kaboodle is a consumer panel, of UK residents. Both panels are recruited and briefed to be available for different methodologies of research. Regardless of this, their suitability for methodologies is ascertained during screening for each research project. Our surveys work equally well on desktop and mobile although if a survey format is not suitable for mobile, we will recommend against it.

SAMPLING AND PROJECT MANAGEMENT

12. **Briefly describe your overall process from invitation to survey completion. What steps do you take to achieve a sample that "looks like" the target population? What demographic quota controls, if any, do you recommend?**

Invitations are transparent and provide information as needed including the generic nature of the survey topic. We are also upfront about the survey length and incentive offers. An opportunity to unsubscribe from our panel is always included.

We select potential participants that balance according to the quotas (based on an estimated response rate) and randomly sort the panellists in Excel.

We exclude panellists from surveys based on level of engagement. We do not want to survey the same participants repeatedly. This exclusion is flexible based on industry and subject matter, and will be discussed with each client at the outset of a project.

Quotas are set as defined by the survey sponsor for each survey.

13. **What profiling information do you hold on at least 80% of your panel members plus any intercepts known to you through prior contact? How does this differ by the sources you offer? How often is each of those data points updated? Can you supply these data points as appends to the data set? Do you collect this profiling information directly or is it supplied by a third party?**

Upon registration to QRS Business Professionals, registrants will be asked to provide the following information:

- Name
- Email Address
- Telephone Number
- Postcode
- Job title
- Job responsibility
- Industry
- Company turnover
- Company employee size

Kaboodle panellists are required to provide the following information upon registration as a minimum:

- Name
- Email Address
- Telephone number
- Date of birth
- Gender
- Home Postcode

There is further profile information they can complete which can assist with pre-selecting them for surveys that are relevant to their personal profile but this is not mandatory.

This information can be updated by members at any time. We also conduct annual panel maintenance, where we contact members and ask if they need to update their records. However panel members can update their details at any time.

We collect this profiling information directly, during registration.

We would only provide these data points in a data set if a participant actively consents for us to do so.

14. **What information do you need about a project in order to provide an estimate of feasibility? What, if anything, do you do to give upper or lower boundaries around these estimates?**
QRS will request the following information before quoting, to establish feasibility and cost. This is not an exhaustive list, as all projects differ:
- Amount of interviews/recruits required
- Task(s) required by participant
- Methodology
- Incentive level (we often recommend this)
- Survey/task length
- Screening criteria
- Quotas
- Whether the research is branded
- Fieldwork period length
- Incidence rate

The above criteria will be assessed, and based on experience, an estimate range will be given.

15. **What do you do if the project proves impossible for you to complete in field? Do you inform the sample buyer as to who you would use to complete the project? In such circumstances, how do you maintain and certify third party sources/sub-contractors?**
QRS will always be transparent and as prompt as possible when a project is impossible to achieve based on the original spec. This is extremely rare, and all avenues will be exhausted, with internal and client consultation before this conclusion is reached. We would always endeavour to find an alternative sample source, from our approved suppliers, to complete fieldwork.

16. **Do you employ a survey router or any yield management techniques? If yes, please describe how you go about allocating participants to surveys. How are potential participants asked to participate in a study? Please specify how this is done for each of the sources you offer.**
We do not use a survey router.

17. **Do you set limits on the amount of time a participant can be in the router before they qualify for a survey?**
N/A (See Q16)

18. **What information about a project is given to potential participants before they choose whether to take the survey or not? How does this differ by the sources you offer?**
We base our invitation model for each survey as defined by our ISO 20252 certification. Each survey invite is transparent and provides the following information as a minimum:
- Length of the survey
- Incentive level
- A unique URL for the survey

- A link to the QRS Business Professionals/Kaboodle website
- Link to QRS privacy policy
- Opt-out information
- A link to our privacy policy

19. **Do you allow participants to choose a survey from a selection of available surveys? If so, what are they told about each survey that helps them to make that choice?**
QRS invites participants, by email or telephone, to surveys individually. The facility to look at all surveys they have been invited to is not available.

20. **What ability do you have to increase (or decrease) incentives being offered to potential participants (or sub-groups of participants) during the course of a survey? If so, can this be flagged at the participant level in the dataset?**
QRS would, in most circumstances, apply the same incentive level to all participants throughout the duration of fieldwork. If an incentive level is changed, or certain participants are offered a different amount, this can be flagged in the dataset if required which is a requirement of ISO 25252.

21. **Do you measure participant satisfaction at the individual project level? If so, can you provide normative data for similar projects (by length, by type, by subject, by target group)?**
QRS has a well established 360° feedback platform (QRSi), where we measure and report on client, project manager, interviewer, and participant feedback. At the end of each completed survey, each participant is presented with optional satisfaction questions. These results inform operational actions and improvements. The results are made available for clients if requested.

22. **Do you provide a debrief report about a project after it has completed? If yes, can you provide an example?**
QRS provide the following information (in the form of expected metrics) prior to fieldwork and, if requested, in a fieldwork summary once data collection is closed:
- Fieldwork dates
- Incidence rate
- Survey length
- Quota breakdown
- Average length
- Incidence rate (broken down by quota if required)

DATA QUALITY AND VALIDATION

23. **How often can the same individual participate in a survey? How does this vary across your sample sources? What is the mean and maximum amount of time a person may have already been taking surveys before they entered this survey? How do you manage this?**
N/A

24. **What data do you maintain on individual participants such as recent participation history, date(s) of entry, source/channel, etc? Are you able to supply buyers with a project analysis of such individual level data? Are you able to append such data points to your participant records?**

New members are assigned an ID number at registration which they keep for their entire panel tenure. We store data of a panellist's recent survey activity (over a minimum of 2 years), pertaining to which surveys they have participated, the date they joined the panel, their demographic profile, and their invite history. We can supply this information to clients, at their request, in aggregate form.

25. **Please describe your procedures for confirmation of participant identity at the project level. Please describe these procedures as they are implemented at the point of entry to a survey or router.**

QRS has a number of validation checks during registration and during the panellist's tenure with QRS Business Professionals to identify and remove fraudulent registrants:

- Panellists cannot sign up with duplicate contact details. Allied to this, new registrants' email addresses, telephone numbers and postcodes will also be analysed against current panellists for similarities.
- Panellists who have been flagged as poor-quality responders across multiple surveys will be deactivated from the panel.
- For each research activity, business demographics submitted within the data collection exercise are cross referenced against sign-up information. Those with mismatches will be flagged within the panel database as a quality issue.

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- The panel is analysed on a regular basis to check new registrants email addresses, telephone numbers, postcodes etc and those highlighted as red flags are deactivated from the panel.

26. **How do you manage source consistency and blend at the project level? With regard to trackers, how do you ensure that the nature and composition of sample sources remain the same over time? Do you have reports on blends and sources that can be provided to buyers? Can source be appended to the participant data records?**

All third party sources go through our stringent supplier acceptance process. Their participants will themselves go through stringent data and validation checks, identical to those applied to our own panellists. Participants from third party sources will have their source tagged in the database stored by QRS. This information would not, typically, be divulged to the client unless requested. We do not utilise our panels for trackers.

27. **Please describe your participant/member quality tracking, along with any health metrics you maintain on members/participants, and how those metrics are used to invite, track, quarantine, and block people from entering the platform, router, or a survey. What processes do you have in place to compare profiled and known data to in-survey responses?**

QRS store information on completing, screening out and quality issues on surveys for a minimum of 2 years. We also store date of these actions. We do not invite participants more than twice per month. Those with repeated quality flags will be removed from the panel, as well as those who have not engaged with the panel/research within 24 months.

On each data collection exercise, where possible, demographic information of entrants will be cross referenced against registration data. Mismatches will be flagged as a quality issue.

28. **For work where you program, host, and deliver the survey data, what processes do you have in place to reduce or eliminate undesired in-survey behaviours, such as (a) random responding, (b) Illogical or inconsistent responding, (c) overuse of item nonresponse (e.g., "Don't Know") (d) inaccurate or inconsistent responding, (e) incomplete responding, or (f) too rapid survey completion?**

The quality of the responses gathered is paramount. As such, continuous and rigorous quality checks are made on the data throughout fieldwork, so that the final output can be trusted:

- Participants are de-duplicated, so that the same participant cannot complete a survey twice. Our data collection software collects the participants IP address, browser version and type of device, and this is analysed to identify duplicates.
- Survey length is analysed. After 10% of the interviews, a median length is identified, and any responses that are below 40% of the median will be automatically excluded.
- The full data set is analysed for participants giving repeated mid-point responses or selecting the same code. Those that repeatedly select 'DK or N/A' responses will also be analysed and potentially removed.
- Participants who have not engaged with the survey by giving inattentive or nonsense free-text responses will have their responses analysed and potentially removed from the data set.
- To reduce the inclusion of bots in the data set, we include trap questions in the survey that only a human can correctly and cognitively answer. Those that answer incorrectly are not allowed to continue. These questions are updated during fieldwork so that bots cannot 'learn' the correct response.

POLICIES AND COMPLIANCE

29. **Please provide the link to your participant privacy notice (sometimes referred to as a privacy policy) as well as a summary of the key concepts it addresses.**
https://qrs-research.co.uk/privacy-policy

Our commitment to Fair Data and GDPR ensures that we keep your data safe, as well as giving you ways to manage, review or withdraw your personal details at any time as per our Privacy Policy. QRS operates in accordance with ISO 20252:2019 and ISO 27001:2017.

30. **How do you comply with key data protection laws and regulations that apply in the various jurisdictions in which you operate? How do you address requirements regarding consent or other legal bases for the processing personal data? How do you address requirements for data breach response, cross-border transfer, and data retention? Have you appointed a data protection officer?**
QRS has ISO 27001 and ISO 20252 certification. Furthermore, we have MRS Fair Data Certification and are MRS Company Partners.

QRS Data Protection Registration Z4975915

We have documented policies and procedures for data breaches – these are available on our website.

QRS employs a designated DPO with DPO qualifications to oversee our operations. This includes reviewing the wording of privacy policies, survey introductions and survey questions that collect PII.

We offer our privacy policy to the participant as required. As QRS, in most circumstances, are Data Processor, our obligation will be to process personal data in line with GDPR, as will ensure informed and explicit consent is granted by the participant to process their data at the outset of the survey. We will also inform them of the purpose and rationale for processing.

The DPO, IT Director and Board review all security events, risk assessments and security controls on a 6 monthly basis. Policies are reviewed on an annual basis as a minimum. Please note that our ISO 27001 certification requires us to undertake audits as well as having clear policies, procedures and being able to demonstrate the technical measures we have in place.

We follow the requirements of ISO 20252 for our retention policies – Primary records are deleted after 12 months and Secondary records at 24 months. Deletion of records containing PII is conducted by the IT Manager and overseen by our DPO. A full audit trail is kept.

Our own Privacy Policy can be viewed at https://qrs-research.co.uk/privacy-policy/

31. **How can participants provide, manage and revise consent for the processing of their personal data? What support channels do you provide for participants?**
All participants can login to their account to modify, add or delete their profiling information as well as unsubscribe. Participants in every communication, or on their login page, have access to a support email address.

32. **How do you track and comply with other applicable laws and regulations, such as those that might impact the incentives paid to participants?**
To ensure that we always comply with the latest laws and regulations we are members of the MRS and ESOMAR and keep up to date with any publications or recommendations that they make.

33. **What is your approach to collecting and processing the personal data of children and young people? Do you adhere to standards and guidelines provided by ESOMAR or GRBN member associations? How do you comply with applicable data protection laws and regulations?**
Please see the document on QRS's Child and Vulnerable Person policy. This is available on QRS's website.

34. **Do you implement "data protection by design" (sometimes referred to as "privacy by design") in your systems and processes? If so, please describe how.**
QRS's systems are compliant to the latest GDPR and data privacy and protection regulations. All QRS employees only have access to information that is required for them to be able to undertake their daily duties with member PII and sensitive information restricted.

All panel members are anonymised using an ID to identify themselves which is then encrypted and masked for each survey that the member takes part in, both internally and externally to prevent any information to be built up due to survey data or surveys that a member has taken part in.

35. **What are the key elements of your information security compliance program? Please specify the framework(s) or auditing procedure(s) you comply with or certify to. Does your program include an asset-based risk assessment and internal audit process?**
QRS has ISO 27001 certification. Furthermore, we have MRS Fair Data Certification and are MRS Company Partners.

The DPO, IT Director and Board review all security events, risk assessments and security controls on a 6 monthly basis. Policies are reviewed annually as a minimum. Please note that our ISO 27001 certification requires us to undertake audits as well as having clear policies, procedures and being able to demonstrate the technical measures we have in place.

All interviews are conducted using Forsta data collection software. Forsta, previously known as Confirmit, are leading industry data collection software providers. All data will be hosted in MS Azure, a ISO 27001 compliant data centre. Certifications and SOCII reports can be provided on request.

QRS is fully cloud and uses Microsoft Azure data centres for its daily operations. All documents and files that may contain PII will only be transferred by a designated client SharePoint directory or a clients SFTP. All data is encrypted when at rest and in transit to at least AES256 standards. Full auditing of files is kept for a minimum of 90 days. This log shows who has created, modified, deleted or shared files.

36. **Do you certify to or comply with a quality framework such as ISO 20252?**
QRS is certified ISO 20252 and all work is undertaken in accordance with their quality control requirements. QRS complies with all its requirements under UK Data Protection legislation.
All work is conducted in compliance with the MRS Code of Conduct.

37. **Which of the following are you able to provide to buyers, in aggregate and by country and source?**
QRS can provide aggregate statistics of panel composition on request.