

RONIN Response to the ESOMAR 26 Questions



COMPANY PROFILE

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

RONIN has performed multi-country data collection studies since 1990. In the early years, this research was done by phone. Web-based data collection was introduced in 2004 and now accounts for well over half of the business.

RONIN has extensive, global panels of Medical Specialists and IT Decision-Makers.

SAMPLE SOURCE

2 Please describe and explain the types of source(s) for the online sample that you provide (are these databases, actively managed panels, direct marketing lists, web intercept sampling, river sampling or other)?

The panels are recruited by telephone by RONIN's healthcare or IT-experienced telephone interviewers who contact respondents at their place of work. For medical specialists this means they are invited to join the panel at their hospital or practice and for IT decision-makers, recruitment is based on D&B lists and screening through company switchboards.

The panels are supported by a strong panel management system and continual maintenance carried out by phone.

3 What do you consider to be the primary advantage of your sample over other sample sources in the marketplace?

The RONIN panels are known for the quality of data provided by panelists. This is due to the rigorous recruitment process used to locate and recruit panelists at work.

Further, online panelists also participate in CATI studies with RONIN, thus creating an active, ongoing dialog with them. Overall, the availability of the call center provides significant flexibility in maintaining the panels, for example, by contacting panelists if they are idle for a period of time so that their membership information can be verified and updated as needed.

In a published paper based on an actual study, the results of a study using the RONIN IT Decision-Maker Panel, accessed both by phone and on the Web, was compared with another well-known panel. The RONIN panel was originally recruited by telephone using the probabilistic sampling methodologies seen in high-quality telephone recruit studies. The other panel was an externally-procured panel developed via targeted solicitations to B2B Websites (similar to the non-probability sampling most seen in use today). Many of the data quality problems attributed to online panels (such as "straight lining" or "flat lining") were markedly reduced in RONIN's online panel, and the data from the RONIN panel was more robust in statistical analyses. The data from the non-RONIN panel was markedly less robust and less useful in modeling.

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

RONIN's panels are never used for direct marketing.

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

RONIN panels cover a wide range of medical specialities and senior IT and business decision-makers. If additional respondents are needed, for example when conducting low-incidence studies, the RONIN call center is used to locate and recruit these respondents. Recruitment to online surveys follows the same IQCS/ISO20252 quality standards used by any other CATI project. Refined, time-tested processes are in use for CATI-recruit-to-Web studies.

6 What are people told when they are recruited?

When recruiting respondents to participate in a specific survey, they are given as much background information as appropriate so they can individually come to an informed decision. This includes topic, purpose, length and incentive. In addition, MRS/ESOMAR codes of conduct and any other relevant information are referenced. Full screeners are included in the study itself, not in the e-mail invite.

For panel recruitment drives, the company is introduced, the research being conducted is described and respondents are asked if they would like to be invited to online and CATI surveys. The respondent can opt-in to either methodology and can opt-out at any time. Interested respondents then go through a short panel questionnaire on the phone so that preliminary information related to the company/hospital/practice they work for and any other additional relevant contact details can be collected.

Generally new panel members are recruited based on actual project needs. This ensures that respondents have a high likelihood of participating in a survey immediately after becoming a member, leading to higher response rates in future studies.

PANEL RECRUITMENT

7 If the sample comes from a panel, what is your annual panel turnover / attrition / retention rate and how is it calculated?

RONIN panelists may participate in a variety of studies using different methodologies, including Web, CATI, depth, or groups. Therefore, attrition rates are low and depend on the respondent type or medical speciality involved. Some respondents are in higher demand than others which must be taken into account. If respondents have been idle for a while, they are contacted by phone when a survey is due or as part of a project.

8 Please describe the opt-in process.

Respondents are recruited at their place of work by the global call center. Interviewers administer a short survey before respondents are invited to join the panel. Respondents have access to a website once signed up and immediately after conducting a survey. The website allows them to order incentives and to update their details.

Most respondents have already participated in at least one interview on the phone and know RONIN. Personal details of respondents are not kept other than the information that is relevant to their company/hospital/practice for which they work or anything relevant relative to their speciality or seniority in the company/medical institution.

RONIN
CORPORATION

2 Research Way
Princeton, NJ 08540 US

Prince Consort House
27-29 Albert Embankment
London, SE1 7TJ
011-44-207-091-1400

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- 9** Do you have a confirmation of identity procedure? Do you have procedures to detect fraudulent respondents at the time of registration with the panel? If so, please describe.

Fraudulent respondents are kept out of the panels by talking to them by phone at their place of work. Consumer sample is not allowed in the RONIN panels.

- 10** What profile data is kept on panel members? For how many members is this data collected and how often is this data updated?

The IT Panel is coded with DUNS numbers by enterprise, company and site for detailed and reliable demographics by industry, company size and revenue. In addition, relevant company address details and respondent e-mail and phone number are maintained.

The information stored for the medical panel consists of respondent contact details and all relevant information related to their prime specialties and place of work.

The information is updated frequently through re-contacting respondents.

Panel counts are updated constantly and are available upon request.

- 11** What is the size and/or the capacity of the panel, based on active panel members on a given date? Can you provide an overview of active panelists by type of source?

Panelists are considered active if they have participated in a survey within a set amount of time, which is dependent on respondent type. Respondents who have not had a chance to participate in a while will be contacted by the RONIN call center, invited to participate in a survey and to verify their details. Live, online reports provide information on size and capacity, so that such information can be provided immediately upon request.

PANEL AND SAMPLE MANAGEMENT

- 12** Please describe your sampling process including your exclusion procedures if applicable. Can samples be deployed as batches/replicates, by time zones, geography, etc? If so, how is this controlled?

RONIN uses its own software, *Results for Research*[®], that was specifically designed to meet the needs of the business. Originally created as a CATI system with all of the rigor required by CATI systems, it has since been extended to the Web. It contains all expected sample management approaches including deployment as batches/replicates, by time zones, and geography.

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

Invitations are kept simple and straightforward. Selected panelists receive an e-mail with relevant background information (according to ESOMAR/MRS and ISO standards) enabling them to take an educated decision on whether or not they want to take part in a specific survey. The e-mail includes an individual link to the survey and a unique username and password. Passwords change from project to project. All respondents are screened in the study itself.

E-mail subject lines only include a reference to RONIN (i.e., RONIN Survey) and keywords outlining the topic of the study.

- 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?

Incentives vary according to interview length, seniority of respondents and countries involved. Incentives for the medical panel are standardized depending on speciality type, grade and length of survey. IT decision-maker incentives vary depending on seniority of respondents, company type and size and interview length.

- 15** How often are individual members contacted for online surveys within a given time period? Do you keep data on panelist participation history and are limits placed on the frequency that members are contacted and asked to participate in a survey?

Data on the participation history of respondents is maintained with an objective of restricting respondents to no more than one survey/month. Respondents are never invited to participate in more than one survey at any time.

POLICIES AND COMPLIANCE

- 16** Is there a privacy policy in place? If so, what does it state? Is the panel compliant with all regional, national and local laws with respect to privacy, data protection and children e.g. EU Safe Harbour, and COPPA in the US? What other research industry standards do you comply with e.g. ICC/ESOMAR International Code on Market and Social Research, CASRO guidelines etc.?

RONIN has a published privacy policy. The company is also ISO9001 and ISO20252 registered and all work is compliant with relevant standards, including local and international laws and regulations. This includes Safe Harbor, MRS, ICC/ESOMAR and CASRO guidelines/standards. The panels are audited on a yearly basis as part of the ISO 20252 registration.

- 17** What data protection/security measures do you have in place?

All panel information is stored in a SQL database system. The panels are secured behind two firewalls and are protected from local threats using a domain-wide security policy. Only personnel with full administration rights have elevated access to all data. Three levels of backups are employed each day -- physical tape, hard disk and cloud-based online backup. Database servers are protected behind a secure key-accessed server room. Local and Web-based access to data is protected through user access credentials and passwords updated on a regular schedule.

- 18** Do you apply a quality management system? Please describe it.

RONIN is an ISO9001:2008 and ISO20252:2006 registered company and as such, is audited twice a year by an independent auditing firm. The quality system and related processes are documented in a business manual which is distributed to all members of staff when they start at RONIN and every time the manual is updated. Internal auditors regularly check if processes are adhered to and if they are still relevant. A manager is employed who oversees quality in the company and maintains an inconsistency log. This log tracks all issues concerning quality and processes. The quality manager reports directly to the General Manager. A client satisfaction survey is conducted by phone. This is the most effective way to understand if all the processes work. Quality issues, processes and client satisfaction survey results are discussed at least once a week in operations meetings.

In addition to normal processes, a RONIN project manager checks data 3 or 4 days after a project has started; customarily after 100 completed interviews or once 10% of the target has been achieved (whichever comes first). Specialized software that checks data live and flags possible fraudsters is used.

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- 19** Do you conduct online surveys with children and young people? If so, please describe the process for obtaining permission.

The RONIN panels are not used for any research with children and young people.

PARTNERSHIPS AND MULTIPLE PANEL MEMBERSHIP

- 20** Do you supplement your samples with samples from other providers? How do you select these partners? Is it your policy to notify a client in advance when using a third-party provider? Do you de-duplicate the sample when using multiple sample providers?

When possible the RONIN call center is used to 'top up' the panel as needed for a specific job. Respondents can be custom-recruited according to specific project needs and quotas.

Third-party sample may be used for regions not fully covered by the panels, either using panels recommended by clients, or working with the RONIN network of pre-approved partners. Clients are notified in advance if non-RONIN panels are used.

A department is dedicated to working with other panel providers. Partners are selected through recommendations, meetings, adherence to relevant industry standards and experience. All projects are run in accordance with IQCS ISO20252:2006/ISO9001:2008 and MRS./ESOMAR standards. Suppliers must comply with RONIN standards and have signed binding MSA agreements covering all aspects of the partnership including confidentiality and quality.

All partners are reviewed on an on-going basis.

- 21** Do you have a policy regarding multi-panel membership? What efforts do you undertake to ensure that survey results are unbiased given that some individuals belong to multiple panels?

There is no policy in place for multi-panel membership as the RONIN philosophy is that respondents are free to choose the panels they want to work with. The panels are B2B panels and not panels related to communities or consumer panels. Respondents are screened thoroughly before they can participate in surveys. A multi-panel bias is very unlikely as panels are not combined.

DATA QUALITY AND VALIDATION

- 22** What are likely survey start rates, drop-out and participation rates in connection with a provided sample? How are these computed?

RONIN achieves participation rates of between 15% and 40%. The actual survey participation rates vary as a result of several study-specific factors such as; respondent type, length of interview, topic of the study, amount of incentive, time of year, methodology, length of time in field and country. The survey participation rate is the number of panelists completing the survey divided by the number of respondents invited to participate.

RONIN's panel management team continually monitor panel performance and participation rates. There is an ongoing collaboration between the RONIN team and our panelists to ensure high levels of satisfaction with RONIN, resulting in high participation rates.

Since panel members have been recruited at their place of work by telephone, they have a good relationship with RONIN which then encourages high levels of participation. Our respondents' satisfaction is a key panel performance measurement at RONIN.

- 23** Do you maintain individual level data such as recent participation history, date of entry, source, etc., on your panelists? Are you able to supply your client with a per job analysis of such individual level data?

Individual-level information is kept. All relevant information is available for our clients should they request it. Participation history and relevant opt-in dates are updated on a regular basis.

- 24** Do you use data quality analysis and validation techniques to identify inattentive and fraudulent respondents? If yes, what techniques are used and at what point in the process are they applied?

Live data checks are applied to flag inconsistencies immediately so that researchers can easily identify inattentive and fraudulent respondents. Those tests are conducted frequently throughout fieldwork. In addition to this, researchers check data at set points throughout fieldwork. The same methodology is applied to work conducted in the CATI center and for the work done by external call centers. This is in addition to all normal quality control processes.

- 25** Do you measure respondent satisfaction?

A group of panel controllers regularly communicate with panelists in their language. Respondents are invited to provide feedback on the quality of the survey during the interview or at the end of the interview. Participation, completion and drop-out rates are measured to assist in assessing respondent satisfaction with a particular survey or with all RONIN studies.

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

Clients are constantly updated on survey progress and completion figures, including giving them access to live reports through online portals.