



SSRS ESOMAR 37

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?

SSRS is a leading full-service, non-partisan public opinion research firm. For more than 30 years, SSRS has specialized in healthcare, public and social policy, and non-partisan political research studies conducted via all data collection modes. Our clients are comprised of various public and private sector entities including major academic institutions, leading national media organizations, and top research institutes.

Founded in 2016, the SSRS Opinion Panel is a probability-based nationally representative panel of U.S. adults ages 18 or older. The hallmarks of the SSRS Opinion Panel are methodological rigor, accuracy, affordability, mode flexibility, and representativeness. Our panel is actively used by major academic institutions, media organizations, and other private sector entities – both in the U.S. and abroad.

Our panel is strictly used for research purposes and gathering public opinion. It is not used for direct marketing.

As a charter member of the AAPOR (American Association for Public Opinion Research) Transparency Initiative, SSRS is committed to full compliance of AAPOR standards and transparency.

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?

The SSRS Opinion Panel team is comprised of industry experts with deep knowledge of probability-based sampling techniques. The Panel team works closely with SSRS methodologists to develop and optimize sampling strategies, which are then automated using the Forsta+ (formerly known as Confirmit) platform. In addition, the Panel team oversees sample releases for every project conducted using the SSRS Opinion Panel and works with frontline project staff to ensure studies are executed to specification.

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?

The SSRS Opinion Panel is a full-service platform and offers a broad range of data collection and analytic services. This includes, but is not limited to, full-service custom surveys, sample-only endeavors, and projects that utilize a hybrid probability/non-probability approach.



Sample Sources and Recruitment

4. Using the broad classifications above, from what sources of online sample do you derive participants?

SSRS Opinion Panel members are recruited randomly based on a nationally representative Address Based Sample (ABS) design (including Hawaii and Alaska). Address-based samples are drawn from the Delivery Sequence File (DSF) maintained by the U.S. Postal Service. Population coverage of the DSF is 98%-99%. Prior to 2022, we recruited a portion of our panel, including hard-to-reach populations, via RDD methodology.

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? (Assume proprietary to mean that the sample provider owns the asset. Assume exclusive to mean that the sample provider has an exclusive agreement to manage/provide access to sample originally collected by another entity.)

100% of sample from the SSRS Opinion Panel is proprietary and exclusive to SSRS. All recruited SSRS Opinion Panelists are wholly owned by SSRS.

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 SSRS Opinion Panel consists entirely of sample recruited based on probabilistic methods. Recruitment is strictly by invitation only. As of 2022, all panel members are recruited via Address Based Sample (ABS). ABS respondents are randomly sampled by Marketing Systems Group (MSG) through the U.S. Postal Service's Computerized Delivery Sequence File (DSF), a regularly updated listing of all known addresses in the U.S. For the SSRS Opinion Panel, known business addresses are excluded from the sample frame. Prior to 2022, we recruited a portion of our panel, including hard-to-reach populations, via RDD methodology.

7. What form of validation do you use in recruitment to ensure that participants are real, unique, and are who they say they are? Describe this both in terms of the practical steps you take within your own organisation and the technologies you are using. Please try to be as specific and quantify as much as you can.

SSRS generates unique survey passwords that are assigned and provided via mail to the randomly selected households. The recruitment survey can only be accessed using their unique passwords. In addition, at the start of every recruitment survey, respondents are asked to verify they live at the sampled address and are terminated if they indicate they live elsewhere. Panelists who join via web are asked to provide their email address and must complete a double opt-in process to confirm their email is correct and working.

One of our de-duplication mechanisms is RelevantID, a digital fingerprint technology that prevents duplicate respondents from completing the survey. Please note that SSRS may use other de-duplication technology solutions at its discretion.



8. What brand (domain) and/or app are you using with proprietary sources? Summarize, by source, the proportion of sample accessing surveys by mobile app, email or other specified means.

SSRS uses Forsta+ (formerly known as Confirmit) software and data warehousing solution for the SSRS Opinion Panel. Forsta+ is the world's leading provider of survey and reporting software. Forsta+ is a sophisticated web-based data collection tool with capabilities to deliver tailored, fully branded, and highly structured surveys for all types of feedback and market research programs. SSRS utilizes Forsta+ for survey design and reporting, as well as for phone, web, and SMS data collection. Web programs are optimized for administration via smartphone or other mobile handheld devices. In our experience, more than half of SSRS Opinion Panel web surveys are completed on a smartphone or other mobile device.

SSRS leverages Forsta+ to invite panelists to surveys via email or SMS (if consenting) and contact telephone panelists via outbound dialing conducted by professional interviewers.

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

The SSRS Opinion Panel only provides sample as a managed 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?

The SSRS Opinion Panel does not offer intercepts. The SSRS Opinion Panel consists entirely of sample recruited based on probabilistic methods.

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?

The hallmarks of probability-based sample are methodological rigor, accuracy, mode flexibility, and representativeness. As such, SSRS Opinion Panel sample is suitable for a wide variety of research applications, methodologies, and survey lengths. We have the ability to target various populations of interest based on panel demographics for research studies. Panelists can be recontacted for multiple surveys for tracking studies. All web surveys are programmed with a responsive layout that ensures surveys are optimized for administration on both desktop and mobile devices.

Panelists may also be recruited for online focus groups. SSRS reserves the right to review any survey topics that are overly sensitive in nature or that require collection of personally identifiable information (PII).



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?

The SSRS Opinion Panel leverages Forsta+ (formerly known as Confirmit) technology to stratify sample based on the target population. For example, for general population studies, sample is stratified by key demographic groups such as age, gender, race and ethnicity, education, Census region, etc. to ensure adequate representation of each demographic group. Depending on the target population and study goals, quota controls may be implemented. Final data is then weighted to population benchmarks to be representative of the target population.

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?

As a part of enrollment process, a variety of socio-demographic and household composition information is collected and saved as part of the panelist profile. This information is collected consistently from all respondents who enroll in the panel. A full list of available demographics can be found at <https://ssrs.com/opinion-panel/>. Key demographics are regularly updated.

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?

In order to provide accurate cost and feasibility, it is most helpful to receive the following information at the proposal stage: Target population group(s), incidence rates, sample size, survey length and complexity, subject matter of research, Spanish language requirement, project timeline, and any special requirements or deliverables such as inclusion of video and graphics, open-end coding, data tabulation, questionnaire design support, and data analysis support. The Panel team can use a combination of expected incidence, historical response rate, and panel composition to determine feasibility.

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?

As a charter member of AAPOR's (American Association for Public Opinion Research) Transparency Initiative, SSRS is committed to full transparency with our clients and the general public. In the event we need to supplement our panel with sample from other providers, SSRS discloses this upfront to the client.

We have strategic relationships with high-quality sample providers. Our technology infrastructure supports use of sample from multiple partners without duplication.



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.

SSRS does not use survey routers for the SSRS Opinion Panel.

17. Do you set limits on the amount of time a participant can be in the router before they qualify for a survey?

SSRS does not use survey routers for the SSRS Opinion Panel.

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?

Panelists are not told any specific information about the subject of a survey prior to participating in order to preserve independence of research and reduce non-response bias. In the invitations, panelists are told the value of the incentive they will receive for completing the survey and are typically given a due date.

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?

No, panelists are never given the option to choose from a selection of available surveys. Each survey invitation includes a unique link to a single survey.

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?

All panelists who qualify for and complete the survey via web are offered a post-participation compensation in the form of an electronic gift card, sent via email immediately after completion of the survey. They have the option of redeeming their rewards as a cash equivalent gift card (such as a Visa gift card) or as a gift card for one of many online or in-store retailers. All respondents who complete the survey via telephone are offered post-participation compensation via a mailed check.

Hard-to-reach population groups are typically offered a higher compensation. The Panel team will often make a recommendation for a higher compensation for longer survey lengths. Incentives values can be adjusted during the survey field period if needed.

We can provide participant-level compensation payout data as a special service.

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)?

All survey-specific respondent communication contains contact information for the SSRS Opinion Panel manager. We carefully review survey-specific respondent feedback and take necessary action promptly in the event an anomaly is detected. In addition, we also ask survey-specific respondent satisfaction questions for our internal quality control. We can insert participation satisfaction questions as designed by the client and provide this data to the client.

22. Do you provide a debrief report about a project after it has completed? If yes, can you provide an example?

As a charter member of AAPOR's (American Association for Public Opinion Research) Transparency Initiative, SSRS reporting is fully compliant with AAPOR's transparency standards. After completion of the study, in addition to a fully labeled data file with demographic weights, SSRS provides a methods report containing detailed information about design, sampling, AAPOR response rate calculations, weighting, and data processing. This report can also contain various performance metrics, including but not limited to margin of error, design effect, survey start rate, survey completion rate, drop-out rate, and overall length of interview.

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?

The SSRS Opinion Panel is a relatively low burden panel in that our panelists generally do not receive more than 2 to 3 surveys per month. This keeps the engagement level and data quality high. As an additional measure, we maintain a 24 hour lock out, so that a panelist cannot be invited to more than 1 survey per day.

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?

SSRS maintains individual participation data including participation rate, number of surveys completed, dates of completed surveys, and registration date. We analyze and use this data for panel management purposes. This data is not a part of our standard deliverables. We can provide aggregated data as a custom service.

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.

Our probability-based recruitment methods ensure that only respondents with a confirmed identity are invited into the panel. In addition, we implement an email double opt-in methodology at the panel registration stage for web panelists to confirm respondent identity. For web surveys, invitations are sent to the unique email address provided by respondents at the time of registration. All email invitations are



addressed to the panelists by name and contain a unique survey link. For telephone surveys, interviewers ask for the member of the panel by name and are trained not to conduct interviews with anyone else in the household who may be willing.

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?

The SSRS Opinion Panel consists entirely of sample recruited based on probabilistic methods and is therefore treated as a singular source. For tracking studies, we make sure each wave of sample is similar in demographic composition with minimized respondent duplication across waves.

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?

SSRS maintains individual participation data including participation rate. The SSRS Opinion Panel regularly tracks panel health and reviews the panel database annually for chronic non-responders (i.e. those who joined the panel but have never completed a survey despite multiple invitations). Chronic non-responders are given a final opportunity to confirm their membership with an engagement survey. Those who do not respond to the engagement survey are excluded from future sampling. We also systematically replenish the panel to account for panel attrition over time.

Upon request, SSRS may program questions into a survey that can compare profiled and known data to in-survey responses.

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 non-response (e.g., "Don't Know") (d) inaccurate or inconsistent responding, (e) incomplete responding, or (f) too rapid survey completion?

For web surveys, quality checks are incorporated into the survey itself. Respondents who fail the quality checks are not included in the final dataset. These quality control measures include checks for speeders, high non-response, and the administration of trap questions to check for consistent responses and attentiveness. Additional quality control measures may be included depending on the scope of the project.

For telephone surveys, interviews are closely monitored by interviewing staff for quality control. In addition, randomly sampled recordings are reviewed by supervisors to monitor quality and interviewer procedures.



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.

The SSRS Opinion Panel Privacy Policy is available at <https://ssrsopinionpanel.com/privacy/>.

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?

Survey response data provided to clients by the SSRS Opinion Panel is anonymized and contains no PII, except in cases where the respondent has given explicit permission to share personally identifiable information.

As a company, SSRS is ISO/IEC 27001:2013 certified. ISO/IEC 27001:2013 is an international standard on how organizations are to handle information security. SSRS holds certificate number IS 743297 and operates an Information Security Management System which complies with ISO/IEC 27001:2013 for the following scope: The information Security Management System for the management of the processes necessary to securely deliver Public Opinion and Market Research to clients in accordance with the Statement of Applicability version 4.0 dated 05/18/2022. Our certificate issued by BSI is valid until 06/24/2024.

The SSRS Opinion Panel stores its database in Forsta+ (formerly known as Confirmit) software. For decades, Forsta+ has maintained one of the highest levels of security in our industry, allowing them to earn the trust of the most demanding companies, and meet their stringent security and privacy requirements. Forsta+'s operations undergo an annual comprehensive SOC 2 Type II (SSAE 18 / AT 101) examination by a highly reputable AICPA accredited firm. Their SaaS production environment, where client data is stored and processed, is ISO 27001 certified, SOC 2 Type II audited and PCI-DSS certified.

In addition to the comprehensive third-party SOC 2 Type II audits of their operations, Forsta+ performs a battery of additional testing to ensure the effectiveness of their security posture. These include weekly penetration testing by information security team which are validated by annual third-party penetration tests by independent security professionals (McAfee). Forsta+ also performs static code-scanning of the software, which is validated by third-party white-hat application testing performed by highly trained cyber-security professionals (Veracode). Forsta+ has always completed the third-party testing with the highest security grade available, "A".

Forsta+'s full security features can be reviewed here:

https://extranet.confirmit.com/Extranet/media/PublicDocuments/SaaS/Confirmit_Horizons_SaaS_Security-January_2019.pdf

SSRS IT department handles all data protection issues.



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 panelists have the ability to opt-out of the panel by contacting the panel manager. Contact information for the panel manager is provided in every invitation survey and within every survey.

32. How do you track and comply with other applicable laws and regulations, such as those that might impact the incentives paid to participants?

SSRS Opinion Panel is fully compliant with all applicable laws in the United States including incentives paid to participants. SSRS is compliant with all regulations set forth by our incentive vendors.

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?

The SSRS Opinion Panel only accepts panelists age 18 or older. In the event that a project seeks to survey the child of an adult panelists, SSRS will first get consent from the responsible adult then ask the child for their agreement. The responsible adult will be told the name and contact details of the research organization, the nature of the data to be collected, the purpose of collecting the data, how the data will be used, and benefits or potential impact of the research.

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.

Our internal systems and processes have all been certified as ISO 27001 compliant. This includes system security, file access/handling, storage, credential management, vulnerability testing, etc.

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?

As a company, SSRS is ISO/IEC 27001:2013 certified. ISO 27001 includes a risk assessment process, organizational structure, Information classification, Access control mechanisms, physical and technical safeguards, Information security policies, procedures, monitoring, and reporting guidelines.

36. Do you certify to or comply with a quality framework such as ISO 20252?

As a company, SSRS is ISO/IEC 27001:2013 certified. ISO/IEC 27001:2013 is an international standard on how organizations are to handle information security. SSRS holds certificate number IS 743297 and operates an Information Security Management System which complies with ISO/IEC 270001:2013 for the following scope: The information Security Management System for the management of the processes necessary to securely deliver Public Opinion and Market Research to clients in accordance with the Statement of Applicability version 4.0 dated 05/18/2022. Our certificate issued by BSI is valid until 06/24/2024.



Metrics

37. Which of the following are you able to provide to buyers, in aggregate and by country and source? Please include a link or attach a file of a sample report for each of the metrics you use.

01. Average qualifying or completion rate, trended by month.
02. Percent of paid completes rejected per month/project, trended by month.
03. Percent of members/accounts removed/quarantined, trended by month
04. Percent of paid completes from 0-3 months tenure, trended by month
05. Percent of paid completes from smartphones, trended by month
06. Percent of paid completes from owned/branded member relationships versus intercept participants, trended by month
07. Average number of dispositions (survey attempts, screenouts, and completes) per member, trended by month (potentially by cohort)
08. Average number of paid completes per member, trended by month (potentially by cohort)
09. Active unique participants in the last 30 days
10. Active unique 18-24 male participants in the last 30 days
11. Maximum feasibility in a specific country with nat rep quotas, seven days in field, 100% incidence, 10-minute interview
12. Percent of quotas that reached full quota at time of delivery, trended by month

The SSRS Opinion Panel is U.S. only and comes from a single probability-based source. We can provide some aggregate data that we use for tracking panel health. This will be handled as a special request on a study-by-study basis.