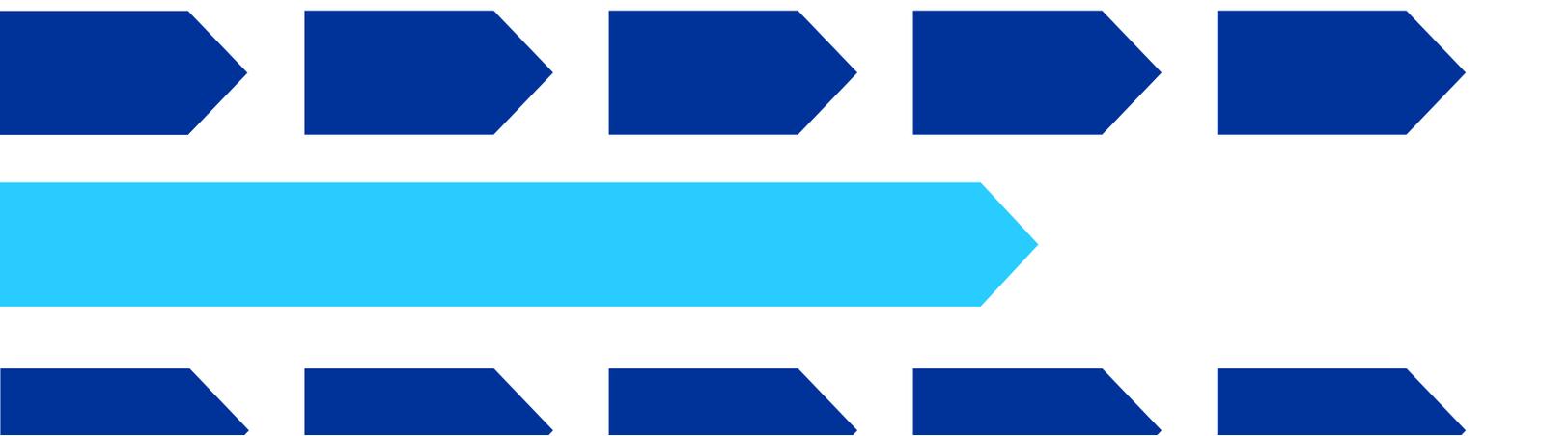


# Toluna's holistic, best-in-class approach to insight quality

toluna\*



# Holistic approach to insight quality

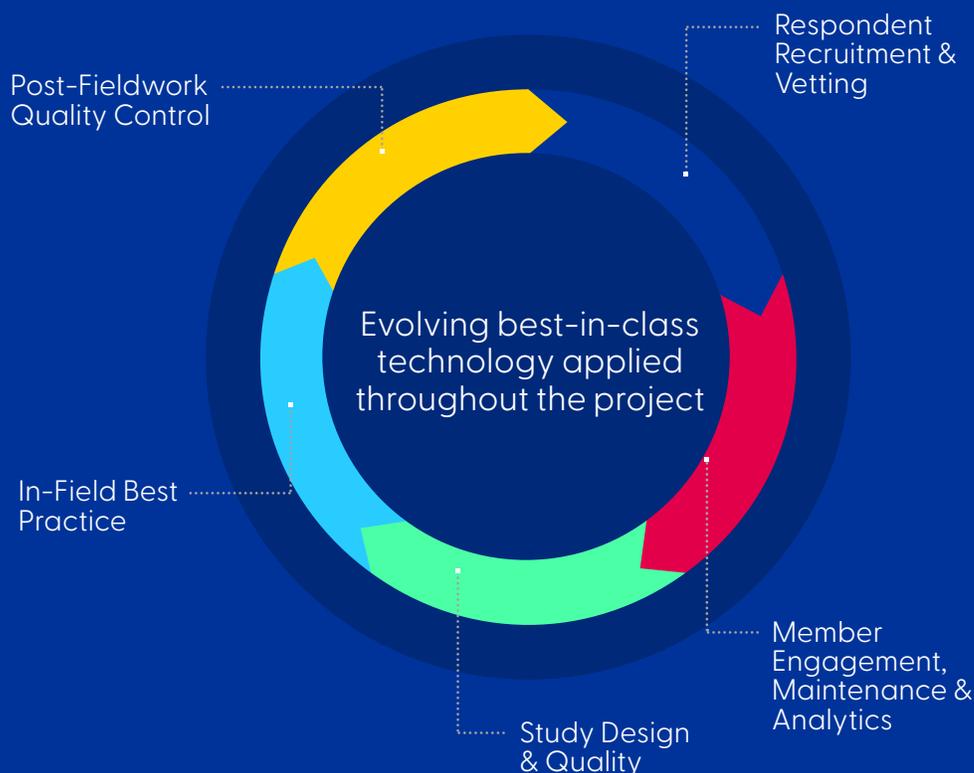


Toluna is a technology company that delivers real-time insights at the speed of the on-demand economy. We do what no other insights company can. We combine innovative technology, award-winning research design, vertical expertise and a panel of over 30 million consumers.

What does this mean for you? It means you can get more research done in less time with less budget. It means you can design a research program that meets your needs, whether that's self-service or full consultancy. **It means you can trust your insights because quality is baked into every part of our process.** And it means you can do it at scale.

A commitment to quality is the foundation to our business, without quality procedures, processes and guidance there will be no sustainable business

As Toluna's technology continues to evolve, we strive to further build quality assurance into the Toluna Start platform.



# Respondent Recruitment & Vetting



Vetting new members is a critical step in ensuring quality insights. Toluna Influencers must be approved before registration is completed and are validated through a 3rd party. Member duplication is prevented through account grouping technology and algorithmic checks that detect member duplication for removal.

## Additionally, member requirements at registration include:

- ▶ Double opt-in
- ▶ CAPTCHA, IP validation
- ▶ Double opt-in
- ▶ Address verification in North America

## What made you want to be a Toluna Influencer?



“Because I think it is useful for society to share opinions that can lead to improved quality of life in a world subject to fierce competition.”

- Mario Paul, 68, France

“I became part of Toluna thanks to a very recommendation from a relative. Being an Influencer of this Community has made me more committed to myself to collaborate and learn from other Influencers with the experiences we share, showing that together and with the great help of the Toluna Team we can be better collaborators.”

- Alain, 35, Spain

“I thought it would be a great opportunity to express my opinions on topics of interest to me and to learn about new topics as well. There have been several new products that I have learned about through my participation in the community.”

- Jasmine, 34, USA

# Member engagement, maintenance, & analytics



## A unique community experience and ongoing best practice

The Toluna community is available in 50 countries around the world and animated via our digital platforms, monthly magazines, as well as frequent engagement campaigns and initiatives.

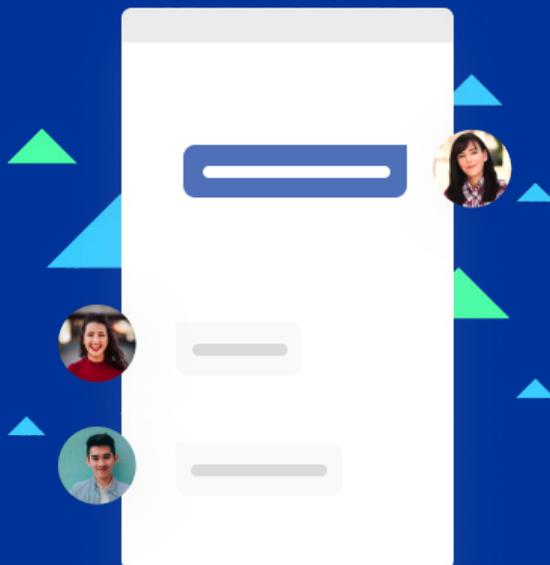
There are many opportunities to exchange and engage with our Influencers—with a truly proactive approach. By providing an enjoyable, rewarding user experience, more Influencers are mobilizing and providing feedback more quickly, allowing us to better analyze data and trends in real-time.

## Our Member Experience is Unique and Engaging

Members are engaged with contests and survey topics that are relevant to them. As the world's largest online social voting platform, our Influencers can:

- ▶ Interact with each other
- ▶ Complete online surveys
- ▶ Play fun games
- ▶ Participate in live forums
- ▶ Create topics/opinions

## Tell us about your favorite survey experience



I really enjoy experiences that are very interactive. There's a survey I did recently where I had to upload pictures of how I was feeling, could be anything off the internet or personal. I liked that, it let me be in control of what I wanted to say and was a little different to the normal - insert your opinion here surveys.

- Meagan, 36, Australia

My favorite experience involves surveys that go far beyond questionnaires, like sharing photos and videos, and actions on social networks. It makes everything more exciting.

- Taise, 25, Brazil

The best surveys are not the ones that give you more incentives, but the ones where you learn things too. Those that go from the beginning to the end with the fixed idea of getting the best and the best opinion and assessment that you have of a brand.

- Isabel, 55, Spain

# Member engagement, maintenance, & analytics



## Toluna Influencers mobile app

Our mobile app, Toluna Influencers, empowers Influencers across the globe to participate in market research opportunities and for it to be recognized anytime, anywhere. On the app, we have diversified our actions with Influencers to better track their needs, wants, habits and practices.

### In the app, members can:

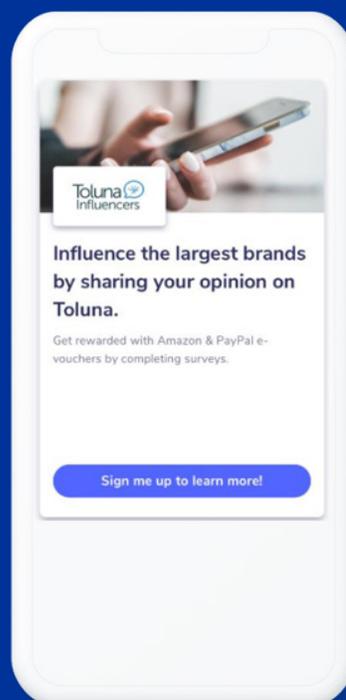
- ▶ Take surveys
- ▶ Engage in diary studies
- ▶ Participate in discussions

### Ongoing member quality checks

We have ongoing member quality checks that ensure participants in your research are reliable and trustworthy.

### These checks include:

- ▶ Participation limits
- ▶ Set to discourage professional survey taking
- ▶ Device fingerprint
- ▶ Used to detect bad behavioral patterns and duplication
- ▶ Proprietary scoring system
- ▶ We've developed our own algorithms to detect poor quality member participation and flag for removal



# Study Design & Quality



## Studies are designed to deliver high quality, actionable insights

Optimized survey design leads to quality insights. In addition to support and training, Toluna provides:

- ▶ 20+ years of consumer insights expertise
- ▶ Market Research Society (MRS) certified staff
- ▶ Sampling design and consistency
- ▶ Online, cross-platform and mobile study design expertise
- ▶ The elimination of possible questionnaire bias
- ▶ Respondents that mirror your precise group of study

## How do we ensure this? By understanding your survey requirements.

When designing a survey it is important to answer the 3 simple questions:

- ▶ **Objectives:** What are the objectives of the study?
- ▶ **Data:** What data do you need to answer the objectives?
- ▶ **Decisions:** What decisions will you make with the data?

Your answers to these questions will underpin all requirements and determine not only how you'll build your survey but also, the people you will need to talk to. Understanding the data flow, will allow an easier interpretation when your survey is complete.



## The importance of good design

Good design matters – effective research and quality data depend on it. Good design:

- ▶ Is effective in addressing research objectives and collecting valid and reliable data to address the research issue clearly and unambiguously.
- ▶ Suited to the practical tasks of data collection, data processing and analysis.
- ▶ Must help the participant to provide accurate, complete and reliable data.
- ▶ Must be a workable, user-friendly tool for the participant and the data analyst.

# Study Design & Quality



## Sample Definition

Think carefully about who you want to include in your sample. Do you need to interview a nationally representative (nat rep) sample? Are you only interested in including respondents of certain ages, gender, regions? Are there specific product usage/ buying criteria to apply?

How you define the sample will affect how you design the research and sample size(s). Remember that it is important to strike the right balance between reaching suitable respondents to answer your business question effectively.

Avoid making your definition so narrow that it becomes infeasible or overly expensive--or risk excluding people who might be interested and have something useful to say.

## Sample sizes & margins of error

As the sample size increases, the margin of error decreases, therefore, a larger sample size is preferable to ensure confidence in the data. If budgets prohibit larger sample sizes, then you need to be aware of the impact on the margin of error.

Often, an “acceptable” margin of error is around 4 percent at the 95% confidence level. We can calculate the margin of error at different sample sizes to determine what sample size will yield reliable results at the desired level. For example, a 4 percent margin of error at the 95% confidence level means that your statistic will be within 4 percentage points of the real population value 95% of the time.

Sample Size	Margin of Error at 95% confidence level
150	8%
300	5.7%
500	4.4%
1000	3.1%
20000	2.2%

## Significant differences

Sample size also links directly to any significance testing you may need to conduct – at a total or sub-group level. For example, with a sample size of 150, a significant difference is seen between a score of 50% and 62% (12pt difference). If the sample size were 500, then a 7pt difference would be significant.

# Study Design & Quality



## Questionnaire design

---

### Opening a survey

The introduction needs to include:

- ▶ Purpose & nature of the research. If you want to disguise this, for legitimate reasons, you must explain the broad subject matter
- ▶ An assurance about confidentiality
- ▶ Duration – good practice dictates you should be honest about this
- ▶ That participation is voluntary
- ▶ It should also be welcoming, warm and friendly
- ▶ Any screener questions just disguise the topic / recruitment criteria to ensure people screen in naturally (rather than because they know you are looking for people of a certain type)

### Closing a survey

Carefully consider how you close the questionnaire to ensure proper closure:

- ▶ “We have now reached the last few questions”
- ▶ Good practice to end with an open-ended question
- ▶ Allows participant to offer final comments on topics covered or on the survey itself
- ▶ Consider whether any follow-up research likely
- ▶ Ask for permission to re-contact
- ▶ Reiterate confidentiality
- ▶ Include a Thank you message and closing screen

---

### Screener

It is important to include questions to determine eligibility, this ensures that only your intended audience is participating in your survey. Use the below screeners for every survey:

- ▶ Required Demographics – to ensure you have a representative sample or to hit quotas
- ▶ Only ask what you need for recruitment at the start, all other demographics at the end
- ▶ Screening and eligibility criteria e.g. participation in / knowledge of the category
- ▶ Do not reinvent the wheel – use the same format each time to ensure consistency
- ▶ Check if you have preferred agreed wording internally
- ▶ Make sure to screen people out ASAP if they don't meet your criteria
- ▶ Any screener questions just disguise the topic / recruitment criteria to ensure people screen in naturally (rather than because they know you are looking for people of a certain type), e.g. which brands have you bought in the past

---

### Wording

Objectivity ensures you get valid and reliable data. Make sure you are reviewing your survey to make certain:

- ▶ It is relevant and meaningful to the participant;
- ▶ It is acceptable to the participant;
- ▶ The participant understands it;
- ▶ It is interpreted in the way you intended; in the same way by all participants;
- ▶ It elicits an accurate and meaningful response;
- ▶ The meaning of the response is clear and unambiguous

# Study Design & Quality



## Questionnaire design

### Simplicity

Don't overcomplicate your survey.

- ▶ Keep questions (and statements & definitions) as short as possible
- ▶ Use simple everyday words e.g. live rather than reside; buy rather than purchase; shop/store rather than retail outlet
- ▶ Avoid jargon and technical language
- ▶ Avoid abbreviations
- ▶ Many words, though apparently in common use, are not properly understood by all people
- ▶ Respondents that mirror your precise group of study

### Structure

Answer formats should also be evaluated to ensure quality responses. Based on whether your question yields an open-ended or structured response, you should consider the following: participating in your survey. Use the below screeners for every survey:

Open Ended Responses	Structured Responses
Address the research objectives?	Visually appealing?
Address the task for data collection & analysis?	Short, succinct and easy to answer?
Fit the required audience?	Using different question types to maintain engagement
Have no ambiguity?	Easy for the respondent to complete?
Represent your brand & our industry?	Compatible with smartphones and laptops?

### Scales

Response scales are often used to measure attitudes, preference, likelihood to buy, satisfaction etc. Make sure you consider the below into account when designing a response scale:

- ▶ Whether to include a "Don't know" option
- ▶ The number of options to include in the scale : 5, 7, 10?
- ▶ Whether to label all items and, if so, how to label them
- ▶ What order or direction to place the scale options (keep consistent throughout the questionnaire)

#### Behavior - buy or try

Definitely would  
Probably would  
Might or might not  
Probably would not  
Definitely would not

#### Rating

Excellent  
Very good  
Good  
Fair  
Poor

#### Rating

Much better  
A little better  
About the same  
A little worse  
Much worse

#### Opinion

Agree strongly  
Agree slightly  
Neither agree no disagree  
Disagree slightly  
Disagree strongly

No interest  
at all

A great deal  
of interest



# Study Design & Quality



## Questionnaire design

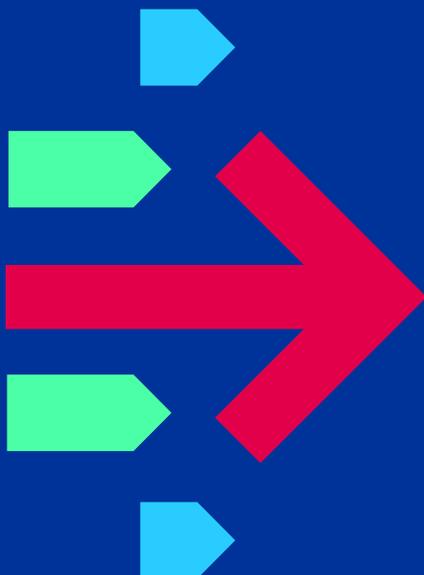
### Order

To maintain interest and cooperation, the order of your questionnaire must make sense.

- ▶ There should be no illogical jumps between topics. It must be in logical blocks. Take respondents on a journey
- ▶ Draw up a flow-chart and group together questions that relate to each topic
- ▶ The order of the topics and questions is important in establishing and building rapport with the participant
- ▶ Do not ask difficult or sensitive topic questions too early in the interview (Impacts on the participant and also on response rates)
- ▶ Questions that are likely to interest the participant should be early in the questionnaire, to engage the participant
- ▶ Good questionnaires are funnel-shaped—moving from general to specific within a module
- ▶ Ensure key questions are as close to the front as possible when engagement is highest

### Order Effects

Order effects insert bias into your data. Wherever possible, randomisation should be used in order to reduce bias. Consider the below when developing your questionnaire:



- ▶ The order in which respondents are shown
- ▶ Brand & attribute lists
- ▶ Stimulus materials (advertising concepts, new product designs)
- ▶ When rating two brands, the order in which these brands appear (always best to randomise) and how they are compared
- ▶ There are situations where it is better not to randomise
- ▶ Brand/retailer lists – sometimes easier to find if these are listed in alphabetical order (this varies depending on the question type and number of attributes)
- ▶ A certain concept or design needs to be seen first in order to establish sufficient knowledge in respondent's mind, e.g. standard model before advanced model
- ▶ The highest price point should be tested first before showing lower price options

# Study Design & Quality



## Questionnaire design

### Length of Interview

In today's world, the shorter the interview the better. There is less drop-out and higher engagement, meaning more accurate insights. You need to achieve a trade-off between cost and the requirements of the brief, within the limits of what is possible in the field. Resist temptation to push the questionnaire to the limit--covering a few areas well is better than covering everything insufficiently. Always test the interview length prior to launching the full project.

**Respondent fatigue:** a phenomenon that occurs when survey participants become tired of the survey task and the quality of the data they provide begins to deteriorate. The survey participants' attention and motivation drop toward later sections of a questionnaire.

This can have a detrimental effect on the quality of the data and/or on customers' positive perception of your brand.

### Pilot Interview

A pilot interview is good practice wherever possible and particularly when a questionnaire is 'new' or if you are making a change to a tracking survey. You should review pilot feedback and iterate accordingly. Additionally, you can have colleagues test the survey and provide feedback. Consider the following:

- ▶ Does the target audience understand the questions?
- ▶ Are the questions interpreted in the way you intended?
- ▶ Are they giving you the data you expected?
- ▶ How long does the whole questionnaire take to administer?

### Effective research and quality data depend on a well-designed questionnaire

Does it:	Is it:
Address the research objectives?	Visually appealing?
Address the task for data collection & analysis?	Short, succinct and easy to answer?
Fit the required audience?	Using different question types to maintain engagement
Have no ambiguity?	Easy for the respondent to complete?
Represent your brand & our industry?	Compatible with smartphones and laptops?



## Fraud Prevention

---

### Survey / Project Level Fraud Prevention

- ▶ Does the target audience understand the questions?
- ▶ Are the questions interpreted in the way you intended?
- ▶ Are they giving you the data you expected?
- ▶ How long does the whole questionnaire take to administer?

## Quality assurance

---

### Respondent behavior monitoring

- ▶ Participation limits deter professional survey taking.
- ▶ Proprietary scoring algorithms detect poor quality members for removal.
- ▶ Engaging community and survey experience.
- ▶ Account grouping is used to detect bad behavioral patterns and duplication.

### Red herring questions

Red herring questions are used to check for respondent engagement. Adding at least one of these questions into your survey, screening out those who fail, will improve overall data quality. For surveys with more than 15 questions, we recommend two red herring questions, with more than 30 questions, we recommend three of these questions.

# Post-Fieldwork Quality Control



Once you have built and launched your survey, it is good practice to review the data upon completion. Whilst our panelists are vetted and reviewed, human factors can still impact a survey.

It's recommended to built these checks into every project:

## Speeders and straightliners

Speeders and straightliners often occur when respondents' levels of engagement and focus are low and are more likely to occur on longer studies (>10 mins).

To remove speeders:

- ▶ Review the median length of interview (LOI) on project completion
- ▶ Determine the level below which is too fast (we recommend those below 20% of median LOI)
- ▶ Identify the respondents who fall below this criterion & use the 'remove respondents' feature to exclude from your data

Straightliner, or always answering the same code are more prevalent for matrix style questions. Review your key question, establish those respondents which only use the same code and remove.



## Open-ended responses

Data quality in open-ended responses are often easier to spot as the response may not make any sense in relation to the question topic. Remember to follow the Open-Ended guidelines outlined earlier to build engagement with respondents.

However, if responses include gibberish, swearing & profanity or are in a different language from the study culture, you can remove using the 'remove respondent' feature in the Toluna Start platform. Having removed any unwanted respondents, send the GID file to your account manager for further action.

Note: Toluna has a zero-tolerance policy on profanity from respondents.

# Maintaining quality for mobile optimization



## \*Best practices

- 1 Design appropriate research adaptable and optimized for multiple
- 2 screen sizes.
- 3 The design of research remains essential.
- 4 Use platforms which are mobile-friendly, adaptive, and intelligent.
- 5 Keep questionnaire design short and simple.
- 6 Make research readable.
- 7 Don't waste participants' time.
- 8 Test and pilot usability across mobile devices.
- 9 Keep your design agile
- 10 Pay attention to dropout rates.

\*From MRS Report, State of Mobile Adoption and Optimisation, Best Practice Guidance, December 2020

# Interpretation



## Comparing results

If you will be comparing results from a 'new' survey with a previous survey, ensure that the same wording is used for key questions and in the same question order if possible. If results differ significantly from some other work that you have done, the likelihood is that the previous work was done differently. Were questions worded differently (prompted vs. spontaneous?, same answer options?, same mean score weights?)? Also, check methodology, sample, and timing to consider for seasonal differences.

## Stimulus: Non-quota impact

Non-quota impact refers to the influence of questions outside of your target audience. If you have set quotas for age, gender etc., then these metrics will be balanced across all stimulus. Imbalances may occur around a level of engagement with the category or the brand. For example, how frequently you purchase. Those that buy more often will tend to be positive to any stimulus.

When comparing multiple stimulus always review those engagement questions in order to minimise any impact.

## Data Quality Checklist

For your next survey, verify that all of the following have been addressed:

- Have you had data quality training from Toluna?
- Have you established an over-quota requirement?
- Always use at least one red herring question in your survey
- For surveys with more than 10 questions, review the LOI upon completion
- If you have matrix-style questions, limit to no more than 3 in a survey, review the response pattern and remove unwanted respondents
- Confirm that your survey is optimized for a mobile experience
- Always follow Open Ended recommendations, flag and remove unwanted respondents
- Share feedback on removals with the Toluna team to maintain ongoing quality

# What sets Toluna apart from other insights



“Toluna is uniquely positioned in this market due to owning and managing one of the industry’s largest consumer panels while also supplementing that asset with a large network of specialty panel partners to supplement our respondent reach when needed. Our panel is more active than most of our competitors because it is simply not a database or managed list of people. Toluna provides members with a social environment where panelists can engage with each other and join sponsored quantitative and qualitative research studies. A big reason why we have not seen any negative effect on panel activity due to the pandemic is that our panelists don’t have to wait for an email invite to join a study. They simply open the Toluna app or log into their Toluna.com account and start engaging and influencing brands, products, and solutions. We collect over 1 million survey responses a day across 70+ markets through our proprietary panel asset.”



**Phil Ahad**  
Chief Digital Officer

# Don't take our word for it, hear what our clients have to say



“We have shifted more than 60% of our research to agile approaches and we have shifted to a more quality based approach. I applaud Toluna for taking a more rigorous approach in this space.”



**-Insights Lead at Global Food & Beverage Brand**



“There still has to be this real eminent focus on quality. Harris Interactive and Toluna are grounded in quality as a starting point and then finding how to deliver quality at speed.”

**-Insights Director at Global CPG Brand**



“Toluna is everything we are looking for in an age of agile market research: a very efficient team, able to put together a proposal in a matter of hours; a flexible tool with standard methodologies as well as purely ad hoc offers; a large panel, to guarantee a shortened fieldwork time; quality data and clean reporting that provides clear and simple answers.”

**-Insights Manager at Global CPG Brand**



“We chose Toluna because their solutions provide us with the breadth of consumer insights and the quality of analytics that we need.”



**-Insights Lead at Food & Beverage Brand**



# Start Knowing

Toluna delivers real-time consumer insights at the speed of the on-demand economy. By combining global scale and local expertise with innovative technology and award-winning research design, we help clients explore tomorrow, now. Toluna is the parent company of Harris Interactive Europe and KuRunData. Together, we push market research toward a better tomorrow.

Learn more at [tolunacorporate.com](https://www.tolunacorporate.com)