



BALTIC PANELBOOK



NORSTAT
anything you need to know.

Welcome to our Panelbook!

Whether You are a partner, client, competitor or stakeholder in Norstat in any other sense, we proudly welcome You to dive into this latest edition of our panelbook.

To get a better impression of who we are and how we may contribute to Your business, we encourage You to take the time to read our lines from A to Z. If You are simply interested in facts and figures on our panels, You will find exactly that on pages 7 to 9. If, on the other hand, You are not sure what exactly You are looking for, we suggest You confer with ESOMARs "26 questions to help research buyers of online samples". You will find our answers on pages 10 to 15.

We hope and trust that this document will answer most of Your queries. However, should you be left with any questions or simply prefer a personal presentation of our online panels and sample services, please feel free to contact us. We have listed the contact details of our main offices on the last page for Your convenience.

Happy reading.

Best regards,

John Lauring Pedersen, CEO

What's inside?

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and why you would want to work with us
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Norstat

is **the largest panel owner in the Nordic- & Baltic region**. Our proprietary panels consist of more than 265.000 people throughout Norway, Sweden, Denmark, Finland, Estonia, Latvia, Lithuania and Poland. The map on the right provides a quick overview of the region we cover.

Our core business idea

is to **collect and process data** on behalf of professional users of marketing and business Information. As such, we offer all methodologies of data collection and reporting formats.

Our ambition

is to be **the best at what we do**. The successes and sustained growth we've maintained during the past decade, tells us that we are on the right path!



Choose us because

You **care about data quality** and believe that the key to achieving reliable, representative and replicable results online, is **best practice approaches** in both recruitment, sampling and questionnaire design.

Recruitment

We acknowledge that a broad recruitment is of paramount importance in minimizing sample bias. Thus, we do not rely on online or so-called self-recruitment, as anything but sensible *supplements* to our **telephone recruited panels**.

Sampling

We maintain detailed profile info on all our panelists, allowing us to draw representative samples and target low penetration segments on both **demographic, socio-economic and psychographic variables**.

Questionnaire design

While we offer **advanced scripting services** (including audio, video, drag & drop etc.), we are also meticulous in our **feedback** to your own questionnaire and acknowledge that different methodologies require different approaches to survey design.



Panel management

Although recruitment procedures, identity validation, profile data registration and - maintenance, securing and protecting personal information etc. are certainly important, we believe that panel management is more than that: It is also about **values** and **ethics** - and about **engaging and supporting** the participants in our research.

Our greatest asset!

At Norstat, we acknowledge that **the people who share their opinions with us** is our greatest asset - indeed our raison d'être. This has been true as long as market research has existed, but requires more appreciation and understanding than ever, in a time where access to respondents is under still greater pressure. With this in mind, **we treat our participants with the greatest respect** - beyond adhering to industry guidelines and complying with national laws and regulations. Our support organisation and incentives structure are testimonies to this.

Support organisation

Dedicated support teams in every country ensure that any and every question that our panel members may have, be to specific surveys, their membership or any other issue, is answered within **24 hours**.

Incentives

People participate in market research for a variety of reasons. Some find it to be an interesting and learning experience, others rightly find it to be a great opportunity to influence brands or voice their opinions - while others again prefer to be rewarded for their efforts. We believe that every motivation should be satisfied, not merely for the sake of ensuring high participation rates, but simply because we find it reasonable and fair to show our appreciation to people who invest their time in assisting us. Thus, **all our panelists receive incentives for every survey** they participate in. We generally offer a choice between giftcards and charity.

Engaging survey participants

The online methodology is the most exciting research tool currently available to our industry, for many reasons. It allows us to present ads, audio- and video material to our respondents and **ask questions in new and much more engaging and interactive ways** than with any other existing methodology. Moreover, we get rid of the interviewer-bias, thus **promoting more honest answers** than the socially desirable. All at a **fraction of the costs** of other methods! The best way to engage our survey participants is to take full advantage of these possibilities, not to copy-paste offline questionnaires, not by exploiting the cost reduction to ask *more* questions...



Profile Registration Survey

DEMOGRAPHIC Variables

- **Name, Date of birth, Gender, District/ Region**
- **Urbanisation**
- Civil status
- Number of people in household (below 18 and 18+)
- Age of children in household

SOCIO-ECONOMIC Variables

- Level of **education**
- **Occupation**, Profession, Sector (public vs. private)
- Housing (flat, house, rented, owned etc.)
- Number of privately owned cars in household
- Brand/s of privately owned cars household
- Annual household and -personal income*¹

BEHAVIORAL and PSYCHOGRAPHIC Variables

- Frequency of travelling by airplane
- Internet use (frequency)
- Willingness to participate in focus groups, in-depth interviews and/or product tests

Notes:

*1: Pre-tax except in Lithuania, where the variable is defined as post-tax.

The Purpose

-of collecting and maintaining detailed profile data on our panels, indeed any online panel, is twofold:

First and foremost it enables us to directly target low incidence segments, which are hard to reach through other modes of data collection.

Secondly, the profile data allows us to continuously monitor and evaluate the composition and representativity of our panels.

While we have made an effort to streamline the profile info across countries in order to promote comparability and presentation, local considerations and cultural differences naturally result in minor variations.

In the Baltic countries, the mandatory part of the registration is limited, while the other variables are asked in a second and voluntary part.



OPTIONAL Profile Registration Survey

Additional DEMOGRAPHIC Variables

- Grown up in the country (person/parents)
- Number of employees at workplace
- Number of employees in company (total)

Additional SOCIO-ECONOMIC Variables

- Managerial responsibility
- Position (managers only)
- Influence on decisions in the company

Additional BEHAVIORAL and PSYCHOGRAPHIC Variables

- Main bank/Insurance company
- Grocery stores/Supermarkets most used
- Access TV channels
- TV channels regularly watched
- Regularly used petrol stations (by brand)
- Statoil cards owned (by exact card)
- Pets in household (cat, dog, other)
- Areas of interest (cultural, sports, politics etc.)
- Internet usage (behaviourial)
- Internet provider
- Cell phone (brand)
- Cell phone operator

Further details?

To obtain a full list of all profile variables, including question wording and corresponding response alternatives, please contact Your local project manager or either of our offices.

We'll be happy to provide you with any additional information relevant to your business and research needs.



ESTONIA



Population 1 342 409

Panel 21 000



	Population 15-74 years	Panel 15-74 years
Male	47 %	29 %
Female	53 %	71 %
15-24 years	20 %	16 %
25-34 years	18 %	21 %
35-44 years	17 %	24 %
45-54 years	18 %	21 %
55+ years	27 %	18 %

Population 15-74 years

Panel 15-74 years

Harjumaa	40%	36%
Hiiumaa	1%	1%
Ida-Virumaa	13%	9%
Jõgevamaa	3%	3%
Järvamaa	3%	3%
Läänemaa	2%	2%
Lääne-Virumaa	5%	6%
Põlvamaa	2%	2%
Pärnumaa	7%	8%
Raplamaa	3%	4%
Saaremaa	3%	3%
Tartumaa	11%	13%
Valgamaa	3%	2%
Viljandimaa	4%	5%
Võrumaa	3%	3%



LATVIA



Population	2 270 894
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Panel	19 500
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Population 15-74 years

Panel 15-74 years

Kurzeme

13%

12%

Latgale

15%

8%

Rīga

32%

38%

Vidzeme

25%

28%

Zemgale

15%

14%

Population 15-74 years

Panel 15-74 years

Male	46 %	40 %
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Female	54 %	60 %
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15-24 years	20 %	19 %
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25-34 years	18 %	23 %
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35-44 years	18 %	24 %
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45-54 years	18 %	20 %
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55+ years	26 %	14 %
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LITHUANIA



Population 3 384 879

Panel 25 500



	Population 15-74 years	Panel 15-74 years
Male	47 %	35 %
Female	53 %	65 %
15-24 years	20 %	24 %
25-34 years	17 %	28 %
35-44 years	20 %	22 %
45-54 years	18 %	17 %
55+ years	25 %	9 %

	Population 15-74 years	Panel 15-74 years
Alytaus district	5%	4%
Kauno district	20%	23%
Klaipėdos district	11%	11%
Marijampolės district	5%	4%
Panevėžio district	8%	7%
Šiaulių district	10%	8%
Tauragės district	4%	3%
Telšių district	5%	4%
Utenos district	5%	3%
Vilniaus district	25%	33%





ESOMAR 26 QUESTIONS



Q1 *What experience does your company have with providing online samples for market research?*

Norstat has been in the market research business since 1997. Building our first panels in 2002, we have been a serious player in the online research market ever since. Today, more than 40 experienced project managers across the Nordic and Baltic region and Poland, handle a large number of online research projects - ranging from minor local ad hoc projects to large-scale multi-country tracking surveys.

Q4 *If the sample source is a panel or database, is the panel or database used solely for market research? If not, please explain.*

Our panels are used exclusively for social-, opinion- and market research.

Q2 *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)?*

Norstat maintains both telephone recruited panels and access panels. The former is recruited on nationally representative CATI surveys, whereas the latter is recruited through a broad variety of sources (including websites, pop-ups, newsletters, non-representative CATI surveys, face-to-face surveys etc.)

All of our panels are actively managed panels with local support teams in all countries. All panelists are able to login to their personal account through our local panel websites. The websites serve to keep our members engaged in our panel- and survey activities. Actively servicing and supporting our panel members help promote and sustain our reputation on the market as a serious and reliable panel provider.

Q5 *How do you source groups that may be hard-to-reach on the internet?*

As our panels are largely recruited by telephone (see answers to questions 2 and 3), you will already find panelists in our panels that would otherwise be hard-to-reach through online recruitment. Further, we always engage in dialogue with - and indeed advise our clients, as to which data collection method that suits a specific project best (fit for purpose!). Although online research has many advantages over more traditional methods in terms of costs, timing, feasibility etc. - we are very conscious of its limitations. Finally, the panelists' profile info enables us to target specific groups quite accurately. This targeting is always followed up by (non-leading) screening questions in the beginning of the actual survey questionnaire.

Q3 *What do you consider to be the primary advantage of your sample over other sample sources in the marketplace?*

The fact that Norstat's panels are app. 80% telephone recruited on average gives us a clear advantage over the majority of online panels on the market, as most providers offer only access panels. The benefits of telephone recruited panels versus access panels are many: A significantly higher share of unique panelists, better response rates, broader representativity (particularly when combined with access panel sampling) etc.

Secondly, our panel members are always compensated for their participation, through a well-functioning and very fair incentive system, that rewards our panelists in respect to the time they have put into answering a given survey. Finally, we never overuse our members. Any individual panel member receives a maximum of 4-5 survey invitations per month.

Q6 *What are people told when they are recruited?*

When being recruited, the respondents are informed that by their acceptance, they agree to be invited to participate in online market research surveys. They are also informed how they will be compensated for their participation. When they have received the registration e-mail and have subscribed to the panel, they can freely remove themselves at any time.

Q7 *If the sample comes from a panel, what is your annual panel turnover/ attrition/retention rate and how is it calculated?*

The annual attrition rate on our panels is 5-10%, based on natural drop-out by panel size. Inactive panelists, i.e. panelists who have not responded to any invitations in the preceding 12 months, are removed from the panel on a continuous (monthly) basis.

Q8 *Please describe the opt-in process.*

Telephone recruited panelists are asked by the end of the CATI interview, if they would be interested in participating in online research. Interested respondents are briefed on our online panel. Those who accept are e-mailed an invitation containing further information and a link to register directly through our panel portal. When the respondent has filled in the registration questionnaire, the new panelist receives an e-mail confirming the registration. During this process, the new panelists are clearly informed that they agree to participate in social-, opinion- and market research and that their participation is always on a voluntary basis. Finally, the panel members are able to opt-out from the panel at any time. Panelists that are recruited through other sources (e.g. online), are equally informed about the terms of participation and recruited through a similar double opt-in procedure.

Q9 *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.*

As the vast majority of our panelists are recruited by telephone, we see no need to confirm the identity of these panel members. The invitation mail always includes a decline option, allowing recipients who may have wrongfully received the invitation the option to reject it - and not be contacted by Norstat again. After registering with the panel, all of our members receive an e-mail confirming their membership. No duplicate e-mails can be registered in our panels. To accommodate the growing demand for validation procedures on online access panels, where panelists are self-recruited, we are currently examining best practise approaches and available methods for detecting fraudulent respondents during the registration phase.

Q10 *What profile data is kept on members? For how many members is this data collected and how often is this data updated?*

We collect numerous profile data on our members in the registration process, including demographic, socio-economic, as well as behavioural- and psychographic data. All the variables that are collected across panels, are listed in our panelbook. The most basic demographic and socio-economic variables are mandatory in order to be registered as a panelist, while the more detailed profiling questions are optional. We actively ask our panelists to update their profile every 6 months.



Q11 *What is the size and/or 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?*

The panel sizes and share of telephone recruited panellists are shown per country in the table below, as of June 27, 2011:

	Number of panelists	% telephone recruited
Norway	68 780	61 %
Sweden	85 895	83 %
Denmark	68 830	76 %
Finland	24 571	68 %
Estonia	20 070	99 %
Latvia	18 065	99 %
Lithuania	23 558	98 %
Poland	38 154	100 %

The capacity of the panels vary with the participation rates, which differs from project to project, depending on LOI, subject, fieldwork period etc.

Q12 *Please describe your sampling process including exclusion procedures if applicable. Can samples be deployed as batches/replicates, by time zones, geography, etc? If so, how is this controlled?*

The sampling process can be adapted exclusively to fit our client's needs. As a standard, our samples are quota based and we are able to create country specific selections on gender, age and region - the most common variables used to create nationally representative samples. If needed, we can create samples on more variables, just as it is possible to exclude panelists from a given survey, based on prior participation in similar (topic) or other specific surveys.

Q14 *Please describe the nature of your incentive system(s). How does this vary with length of interview, respondent characteristics, or other factors you may consider?*

As a standard, we compensate our panelists with 1 point per minute (of estimated interview length). On longer surveys we may add further incentives to this, in order to promote a desirable participation rate. The panelist's 'save up' their points on their personal panelist account and once reaching a certain amount of points, they can choose to exchange their points into a variety of different incentives, e.g. gift cards, lottery tickets, charity or other. The types of incentives offered, differs a bit from country to country.

Q15 *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?*

Our members participate in 1-2 surveys per month on average. In the nature of things however, some target groups receive more survey invitations than others. Norstat has set a limit of maximum 5 survey invitations per month. Panelist participation history is stored.

Q13 *Explain how people are invited to take part in a survey. What does a typical invitation look like?*

The invitation is always in the form of an e-mail. The invitation text does not include any information about the topic of the survey, as this may affect the panelist's willingness to participate and thus create bias in the collected data. The only information that is given in addition to the link to the online questionnaire, is the estimated length of the survey and what incentives the respondent will receive in compensation for participating. Finally, the invitation mail includes a brief standard text, reminding the panelist that their participation is anonymous, how to contact support etc.



Q16 *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.?*

All surveys are being executed according to local laws in each country - and in accordance with the ESOMAR guidelines and standards. All registered data on our members are used solely for social-, opinion- and market research purposes. Further, all members are informed about how their information is managed. Panel members can choose whenever they wish to respond to an invitation and they can always decline to participate in a given survey. Norstat has an extensive data security solution to protect our data from unauthorised intrusion. We never interview persons below the age of 15 without their parents' explicit approval.

Q17 *What data protection/ security measures do you have in place?*

We are using global, well-established and recognised software suppliers for all our systems. This includes backups and security for all our data.

We currently use ConfirmIt and Catglobe for scripting survey questionnaires and ConfirmIt Community Panels as our panel management platform.

Q19 *Do you conduct online surveys with children and young people? If so, please describe the process for obtaining permission.*

We do not conduct surveys with children below the age of 15, without their parents explicit approval. This approval is normally achieved by e-mailing the parents with children in the relevant age span, asking whether their child would be interested - and if so, for their acceptance to let their child participate in the specific survey.

Q18 *Do you apply a quality management system? Please describe it.*

Our local support staff provide support to our panel members, aiming to answer any questions or queries within 24 hours. Apart from helping to promote and maintain our reputation on the market, the direct feedback from our survey participants enables us to quickly identify any technical issues or errors, that may have occurred *after* a given survey has been tested and launched. We regularly carry out random safety checks to identify fraudulent respondents, e.g. by measuring and comparing the individual respondent's answering time on a given survey. In 2010, Norstat began the process of becoming ISO certified. All projects are implemented through our own in-house developed software- and common production system (internally called PROCON for 'Project Control'). This tool ensures that common procedures are followed in the implementation of all projects and the quality thereof.

Q20 *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?*

We always keep close contact with our clients and never supplement our samples without prior consent from our client. On the vast majority of projects we only use our own panels. Third party providers are selected on the basis of their professionalism and the quality of their panels. We do not normally have any means of de-duplicating the sample when using other providers. However, firstly, due to the size and capacity of our panels, we rarely need to supplement our samples. Secondly, as the vast majority of our panel members are recruited by telephone, the share of unique panelists is generally higher than on an average access panel.



Q21 *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?*

We do not currently have a policy in place for this issue. However, as our panels are app. 80% telephone recruited, we have a large proportion of unique panelists, diminishing the risk of any potential multi-panel-membership bias.

Q24 *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?*

Our project managers always perform quality checks before delivering data to a client. This is currently done on a manual basis, but will be more systematised - and to some extent automated - as software based tools are developed and become available.

Q22 *What are likely survey start rates, drop-out and participation rates in connection with a provided sample? How are these computed?*

These vary from project to project, as they depend on several factors: The length and topic of the survey, the questionnaire design and layout, project period and timing, target group etc. In general, on a 5-10 minute survey with 100% incidence rate, the average participation rate is around 30% within 24 hours of launching the survey. At the same questionnaire length, the drop-out rates vary from 3-15% depending on - among others - the factors mentioned above.

Q25 *Do you measure respondent satisfaction?*

Yes. Historically, our panel members have been asked 3 standard satisfaction questions upon completion of every survey - measuring satisfaction on survey length, logic and language. We are currently setting up a similar measurement procedure in our new panel management system. In addition, we regularly carry out internal projects, both to measure panelist satisfaction and to control the quality of our panel support teams - as well as to explore other parameters such as panelist motivation drivers etc.

Q26 *What information do you provide to debrief your client after the project has finished?*

Depending on client needs and requirements, we provide information on field period, sample size, actual length of interview and incidence rate, number of screenouts, drop-outs and quota full. If desired, we also share the respondent satisfaction results as well as any other information the client may wish to receive, that does not compromise the anonymity of our panelists.

Q23 *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?*

Yes, we do have such individual level data stored on our panel members. We do not normally supply this information to our clients though, but if required, we are able to provide this information.

Visit our panel sites at:

Estonia: www.panel.ee

Latvia: www.panel.lv

Lithuania: www.panel.lt





HOW TO GET IN TOUCH!

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