

METHODOLOGY PAPER

B2B RESEARCH · SPECIFICATION & SOURCING

Trustworthy *B2B* Sample

A Methodology for Specifying and Sourcing Business-Professional Respondents

Two things decide whether a B2B data file can be trusted: how precisely the audience is specified, and where the sample comes from. This paper is a vendor-neutral guide to both — writing an auditable specification, understanding the source types behind a B2B sample, and holding a provider to a clear standard of source transparency.

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“In B2B research, the quality of the conclusion can never exceed the quality of the respondent — or the clarity of how you defined them.”

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ABSTRACT

Business-to-business research informs decisions worth far more than the studies behind them, yet the sample underneath those decisions is harder to source and easier to misrepresent than in any consumer category. This paper concentrates on the two levers a buyer most directly controls: **specification** — turning a vague audience into variables a provider can target and you can audit — and **sourcing** — understanding where B2B sample actually comes from and insisting on transparency about it.

It sets out a specification framework, a plain-language taxonomy of B2B sample sources, the trade-offs between single-source and blended sample under one master screener, and a concrete disclosure standard for judging whether a provider is being transparent. Respondent verification, feasibility modelling, and quality control are treated in depth in companion papers in this series; here they appear only as the destinations a good specification and an honest source make possible.

CONTENTS

01	Two levers decide B2B data quality	Specification and provenance
02	Specify the audience as variables	An auditable sample definition
03	Where B2B sample comes from	A taxonomy of source types
04	Single-source vs blended sample	Comparability under one master screener
05	The source-transparency standard	What a provider should disclose
06	Commissioning B2B sample	What to ask & where this series goes deeper

WHO THIS IS FOR

Client-side insights and research buyers commissioning B2B studies; **agency and supplier-side researchers** writing specifications and briefing fieldwork; and **procurement and marketing leaders** comparing sample partners. No prior sampling expertise is assumed; practitioners can skip to Section 03.

01 THE PROBLEM

Trust in a B2B data file rests on two things you control before launch.

B2B audiences are low-incidence, high-value, and easy to overstate — a single mis-classified respondent can visibly move a small, senior sample. But two levers do most of the work in keeping the data trustworthy, and a buyer controls both before a survey ever launches: how precisely the audience is **specified**, and where the sample is **sourced**. This paper is about getting those two right.

Lever 1 · Specification — a title is not a target

"IT decision-maker" means one thing at a ten-person firm and another at a Fortune 500; "involved in purchasing" can describe an approver or a bystander. An audience described in titles alone mixes populations that should never share a data file. A specification turns that audience into discrete, targetable, auditable variables — the subject of Section 02.

Lever 2 · Provenance — identical screeners, different sources, different answers

Two studies with the same screener can return different results if their sample comes from different places. Source composition is a methodological variable, not a procurement detail — yet it is invisible unless a provider discloses it. Sections 03–05 open up where B2B sample comes from and what transparency about it should look like.

THE THROUGHLINE

Specify tightly; source transparently. Get these two levers right and the rest of the quality chain — verification, feasibility, QC — has something solid to act on. Get them wrong and no amount of downstream cleaning can rescue the file.

A note on scope: this paper deliberately stops at specification and sourcing. **Respondent verification, feasibility & incidence**, and **quality control** each get a dedicated paper in this series — see the map on the final page — so none is compressed into a paragraph here.

02 SPECIFICATION

Write a specification a provider can target and you can audit.

Most B2B feasibility and quality problems begin as definition problems. A specification resolves an audience into variables that can be targeted at recruitment, confirmed at the screener, and checked against the finished data. Capture each of the following as a separate field — not folded into one job-title string.

Job function & department	Finance, IT, IT-security, HR, Operations, Marketing, Procurement — the functional lens that determines relevance.
Seniority level	Individual contributor → Manager → Director → VP → C-suite. Capture function and seniority separately ; together they are far more reliable than a single title string.
Firmographics	Company revenue band and/or employee headcount. The same title carries different authority at different company sizes.
Industry vertical	Specified at the level the study needs — broad sector, or a precise NAICS / SIC code where the category is narrow.
Purchasing authority	Final decision-maker, strong influencer, or recommender. The most over-claimed dimension — and the one to define most explicitly.
Geography	Country, region, or metro concentration — with explicit treatment of multi-country quotas and market differences.

Make every variable auditable

The test of a good specification is simple: for each variable, can you describe how a completed respondent's claim would be checked? Capture function and seniority as separate questions; express category responsibility concretely ("which of these do you personally approve, influence, or have no role in"); and record firmographics that can later be cross-referenced against stored profile data. A variable you cannot describe how to verify is a hypothesis, not a quota — and unverifiable specifications are where B2B budgets and timelines quietly fail.



FIG. 01 — A SPECIFICATION IS THE CONTRACT THE STUDY IS AUDITED AGAINST

PRINCIPLE

Every later stage refers back to the spec: the provider targets it, the screener confirms it, QC audits against it. Time spent here is repaid downstream.

03 PROVENANCE

Five places a B2B respondent can come from — each with a different profile.

"Online sample" is not one thing. A B2B respondent reaches a survey through one of several distinct supply routes, and each carries its own strengths, risks, and disclosure obligations. Knowing which routes are in your study is the

SOURCE TYPE	WHAT IT IS	STRONGEST FOR	WHAT TO WATCH
Proprietary managed panel	Members recruited, double-opt-in, and profiled by one provider over time.	Known, re-contactable, pre-profiled respondents; trend work.	Depth in any one narrow B2B cell is finite.
Partner / blended panels	Sample aggregated from multiple third-party panels to add reach.	Filling low-incidence cells one panel can't reach alone.	Each source must clear the same QC bar; blend share must be disclosed.
Survey router / exchange	A system that allocates available participants across many live studies.	Efficiency and yield across a large supply base.	Allocation logic and router use should be disclosed.
Programmatic / open recruitment	"River" or intercept sampling that recruits at the moment of need.	Fast reach and fresh respondents outside fixed panels.	Identity & professional attributes are least pre-established — verify hard.
Telephone (CATI) & offline	Live interviewer outreach, often list- or referral-based.	Very senior, very rare, or low-incidence targets online misses.	Held to the same master screener as online (see Section 04).

WHY THIS MATTERS BEFORE YOU COMPARE QUOTES

Two providers quoting the same audience may be proposing entirely different source mixes. A like-for-like comparison is only possible once you know which of these routes each is using — which is why provenance, not price, is the first question.

04 **BLENDING**

Blending adds reach — and a comparability obligation.

For rare B2B targets, no single panel may be deep enough, so providers blend sources to reach the cell. Blending is legitimate and often necessary — the Advertising Research Foundation's Foundations of Quality work specifically examined how to identify duplicate respondents when multiple sample sources are combined.³ But every added source is a new variable that has to be controlled, not just summed.

CONSIDERATION	SINGLE-SOURCE SAMPLE	BLENDED / MULTI-SOURCE
Concentration	Skews toward where that panel is strong	Dilutes single-panel bias across sources
Reach for rare targets	Capped by one panel's depth	Aggregates depth to reach low-incidence cells
Duplicates	Contained within one source	Must be de-duplicated across sources
Transparency burden	Simple to describe	Requires each source and its share to be disclosed
Quality control	One QC regime	Every source must clear the same bar before blending

One master screener, however the respondent arrived

The discipline that makes blending safe — and that makes adding a telephone (CATI) channel for rare targets safe — is a **single master screener applied identically to every source**, so that a "qualified respondent" means exactly the same thing whether they came from a proprietary panel, a partner, a router, or a phone list. Without it, source becomes a hidden variable and the halves of your sample stop being comparable. With it, reach can grow without the definition drifting.

BUYER'S QUESTION

Ask directly: **"If my sample is blended, is one master screener applied to every source, and are duplicates removed across sources?"** The answer separates a managed blend from a pile of lists.

05 TRANSPARENCY

What a transparent provider will tell you on request.

Source transparency is not a courtesy; it is a documented expectation of the field. ESOMAR's 37 Questions press providers to disclose their sources, the share each contributes to a blend, and whether a router allocates participants; the Insights Association Code requires members to provide enough information to permit independent assessment of data quality.^{1,2} In practice, a transparent provider can answer all of the following without treating any as a trade secret.

01 Sources in the blend — which panels and supply routes make up the sample.

02 Share of each — the proportion each source contributes to the delivered completes.

03 Router use — whether a survey router allocates participants, and on what logic.

04 Third-party flags — when sample is sourced from outside the provider's own panel.

05 De-duplication — how duplicate respondents are detected across sources.

06 Screener parity — confirmation that one master screener applies to every source.

07 Quality metrics by source — removal and replacement rates reported per source and country.

08 Standards posture — the quality framework (e.g. ISO 20252) the work is run under.

THE TRANSPARENCY TEST

Reluctance to answer is itself an answer. None of the eight items above exposes a trade secret; together they are the difference between sample you can describe in a methodology statement and sample you are simply hoping is sound. A provider who discloses them readily is one whose work you can defend to a stakeholder later.

06 IN PRACTICE

Six questions about specification and sourcing — and where to go deeper.

This paper's scope reduces to a short, specific set of questions to ask before you commission. They are deliberately about specification and provenance only; the companion papers below carry the verification, feasibility, and QC questions, so nothing here repeats them.

Ask about specification & sourcing

Six questions that reveal whether the front end of your study is sound.

- ✓ **Auditable spec** — are function, seniority, firmographics, and authority captured as separate, checkable variables?
- ✓ **Source mix** — which of the five source types make up my sample, and what share is each?
- ✓ **Router** — is a survey router used, and how are participants allocated?
- ✓ **Master screener** — is one screener applied identically across every source and channel?
- ✓ **Cross-source de-duplication** — how are duplicates removed when sources are blended?
- ✓ **Disclosure on request** — will you report source shares and quality metrics by source and country?

WHERE THIS SERIES GOES DEEPER

No. 132 · 133	Verifying respondents. How professional, clinical, and decision-authority claims are confirmed against evidence.
No. 134	Feasibility & incidence. Modelling who will qualify, and how long fielding takes, before launch.
No. 137	Quality control. The pre-field, in-field, and post-field checks that audit completes before delivery.

▲ CONCLUSION

Trust starts with specification and provenance.

The trustworthiness of a B2B data file is largely set before the first complete arrives — by how precisely the audience was specified and how honestly the sample was sourced. Write the specification as separate, auditable variables; understand which of the five source types are in your study; treat blending as a comparability obligation met by one master screener; and hold the provider to a plain standard of source disclosure. Do that, and verification, feasibility, and quality control have firm ground to stand on. The ESOMAR, Insights Association, ARF, and ISO 20252 frameworks exist precisely so buyers can ask for this rigour in consistent terms — and recognise it when they see it.^{1,2,3,4}

§ REFERENCES

- [1] ESOMAR. **37 Questions to Help Buyers of Online Samples**. Amsterdam: ESOMAR, 2023. esomar.org
- [2] Insights Association. **Code of Standards and Ethics for Market Research and Data Analytics**. Washington, DC: Insights Association. (Successor to the CASRO and MRA codes; reviewed annually.)
- [3] Advertising Research Foundation. **Foundations of Quality (FoQ 2) — Online Research Quality Initiative**. New York: ARF. (Research-on-research into online sample quality, including duplicate detection across multiple sample sources.)
- [4] International Organization for Standardization. **ISO 20252:2019 — Market, opinion and social research... Vocabulary and service requirements**. Geneva: ISO, 2019.

Sources are cited for the buyer-evaluation, ethics, and quality-management frameworks referenced; the ARF Foundations of Quality work is cited for its examination of sample-source quality and cross-source duplication, not for any specific rate. Methodological principles stated without a citation (e.g. that a narrower target lowers incidence, or that source mix can shift results) are definitional to survey sampling. This paper publishes no incidence, fraud, or quality-rate figures; any figure specific to a study should be measured from that study's own data.

§ ABOUT

CatalystMR

CatalystMR is a global market-research panel and fieldwork partner specialising in **hard-to-reach B2B, healthcare, and niche audiences**. We help buyers specify a target precisely and source it transparently — pairing verified online sample with live telephone (CATI) capability under one master screener, one QC standard, and one point of contact.

We publish our own responses to ESOMAR's 37 Questions and disclose source composition on request rather than treating provenance as a black box.

Compliance posture: our methodology is aligned to the ESOMAR Code and Guidelines and the ISO 20252 framework, and we are certified under the EU-U.S., UK, and Swiss Data Privacy Frameworks, with personal data siloed from response data.

B2B SAMPLE

SPECIFICATION

SOURCING

TRANSPARENCY

ESOMAR 37

ISO 20252

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Send us your B2B target and we'll return an auditable specification and a transparent source plan — with a modelled feasibility range, typically within 24 hours — not a hopeful number.