ZA5659

Online Panel Software
(Online Panel Research)

- Codebook -
Chapter 18

Online Panel Software

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Abstract

The chapter offers an evaluation of what is required for the efficient and effective operation of an online panel. It sets out the essential technical capabilities that panel software should support for anyone wishing to operate their own panel, and identifies useful refinements that support best practice.

Good tools will not necessarily result in good research, but tools that are deficient make it harder to do research well. The aim of this chapter is to provide an understanding of what panel management software needs to do to facilitate good panel research in light of a growing body of literature concerned with limitations, deficiencies and even bad practices in online panel research, which are discussed in the other chapters of this book.

It includes consideration of the requirements for panels from the three perspectives of the a) panel manager, b) the research user of panels and the c) panel member or panelist, in these seven areas:

1. Panel recruitment
2. Panel administration
3. Panel member experience and self-administration by panelists
4. Sample selection
5. Data capture from survey activities and linkage with other databases or sources of data
6. Analytics: measuring the ‘health’ and quality of the panel
7. Active management to maintain coverage and consistency over time

To establish the extent to which panel management software products offered by software developers satisfy these requirements, the author conducted a survey among the relatively narrow field of specialist providers. The responses from eleven commercial and three open source developers are presented as a series of tables throughout the text. A dataset accompanying this chapter allows direct comparison of the capabilities provided by the different software products.

The chapter describes each capability with reference to its importance in improving efficiency, maintaining quality and facilitating best practice, and its prevalence among the software packages surveyed. It concludes by identifying areas where improvements are needed or further development is required in many of the products on offer.
Keywords

- Panel management Software
- Online research
- Research Community Software
- MROCs
- Online survey software
- Sampling
- Survey tools
- Research technology
- Panel database systems
- Respondent administration

Dataset used in preparing the chapter

Online Panel Software Survey

Survey fielding dates:

September 2012-January 2013 with an update in April 2013

Data collection agency

meaning ltd

Data archive link

https://dbk.gesis.org/DBKSearch/SDESC2.asp?no=5659&db=E

Variables used in preparing the chapter

<table>
<thead>
<tr>
<th>Variable name</th>
<th>Question</th>
<th>Possible answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>Which of these tools do you offer?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standalone panel management software capable of being used with other</td>
<td>Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>online research tools</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Panel management integrated with your own online research tools</td>
<td>Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>Software for running online research communities (that goes beyond basic</td>
<td>Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>panel management)</td>
<td></td>
</tr>
</tbody>
</table>
Q2 **What is the underlying database platform?**
- Microsoft SQL Server
- MySQL
- Oracle
- Other proprietary (please state)
- Other open source (please state)

Q3 **Data Protection in Europe. Is the software offered as…**
- An enterprise solution, to run on the client’s own server
- A web-based “software as a service” solution
- Part desktop or enterprise/Part SAAS
- Either enterprise or SAAS

Q4 **If offered as SAAS at Q3**
**Does your solution comply with EU data protection?**
- We provide servers and data storage within the European Union
- We operate under a USA Safe Harbor agreement

Q5 **What methods do you support for panel recruitment? (Please select all that apply)**
- Email invitation
- Website link
- Website advertising
- Website pop-up
- QR Code or advertised link for mobile devices
- Others (please specify)

Q6 **Do you support double opt-in, when required by the user?**

Q7 **Do you support any confirmation of identity methods? Please state what.**
Q8 **How is profile data collected at the time of recruitment?**

- a) From a pre-set or limited profile form defined within the panel software
- b) From a fully customisable profile survey created and administered within the panel software
- c) From an external panel survey imported into the panel database
- d) From other sources (please specify)

Q9 **What is the effective limit to the number of panellists the panel may contain?**

Enter number or state 'no effective limit'

Q10 **What is the effective limit on the amount of profile data a panel may contain (e.g. the number of variables)?**

Enter number or state 'no effective limit'

Q11 **What best describes the database design of your panel database?**

- a) A separate database for each panel
- b) A single database organised into any number of virtual, functionally independent panel databases
- c) Something else

Q12 **Does your software provide a specific interface for panel administrators to use as…?**

- A desktop graphical user interface
- A web based interface
- Other: specify

Q13 **Do you provide any of these open interfaces to your panel database?**

- ODBC connectivity
- A documented API or SDK
- Set of stored procedures to access the database
- Web services interface
ETL /Import support
Published database schema
Other: please specify

Q14 Can each panel have its own themed panel or community page?

a) Yes, this is a task for a software consultant/web designer
b) Yes, can be created by a panel administrator
c) No, the respondent interface is standard
d) No, but we plan to develop user-defined themed panels

Q15 What incentive management capabilities do you provide (select all that apply)

Points for conversion into rewards at a fixed rate per survey
Points for conversion into rewards at variable rates
Entry and administration of prize draws
Kudos points and awards, such as badges or enhanced status
Other: please specify

Q16 Can you immediately suspend further contact and reminders, e.g. upon learning the panel member has died?

Yes/No/Planned

Q17 Can you create and import panellists for one-off research activities that will not be contacted again?

Yes/No/Planned

Q18 Are panel members able to update their profile information…?

Online, at any time
Online, in response to an invitation or reminder
By answering questions in a specific profile or update survey
<table>
<thead>
<tr>
<th>Q19</th>
<th>Are panel members able to update their profile information…?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Email Yes/No/Planned</td>
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<tr>
<td></td>
<td>SMS message Yes/No/Planned</td>
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<tr>
<td></td>
<td>Online notification when logged into the panel or community site Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>Notifications via a mobile app Yes/No/Planned</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q20</th>
<th>What tools, activities or items can the panel member access via their panel portal?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Surveys Yes/No/Planned</td>
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<tr>
<td></td>
<td>Polls Yes/No/Planned</td>
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<tr>
<td></td>
<td>Open discussion forums Yes/No/Planned</td>
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<td></td>
<td>Blogs Yes/No/Planned</td>
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<tr>
<td></td>
<td>Co-creation tools Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>Public profile visible to other community members Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>Reward history Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>Reward redemption Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>One-to-one messages with panel administrators Yes/No/Planned</td>
</tr>
<tr>
<td></td>
<td>One-to-one messages with other community members Yes/No/Planned</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Q21</th>
<th>Do you provide an integrated mobile app? Yes/No/Planned</th>
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<table>
<thead>
<tr>
<th>Q22</th>
<th>If you offer a mobile application to panel members, which of these are also available via the mobile app?</th>
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<td></td>
<td>Surveys Yes/No/Planned</td>
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Public profile visible to other community members  Yes/No/Planned
Reward history  Yes/No/Planned
Reward redemption  Yes/No/Planned
One-to-one messages with panel administrators  Yes/No/Planned
One-to-one messages with other community members  Yes/No/Planned

Q23  **If a panellist is willing to participate but is unable to because of ineligibility or because the survey has closed, are you able to:**

a) Credit them with a reward  
b) Engage them in other activities  
c) Either of these  
d) None of these

Q24  **Which of the following can you use to select samples?**

Any profile data  Yes/No/Planned
Previous survey responses  Yes/No/Planned
Original recruitment source or method  Yes/No/Planned
Participation history and level of engagement  Yes/No/Planned

Q25  **Is there any limit to the combinations of selection criteria you can apply to one sample selection?**

Enter number or state 'no effective limit'  Open text

Q26  **Can sample selection take into account the following to ensure that panellists are not over-researched:**

Frequency of invitation  Yes/No/Planned
Frequency of participation  Yes/No/Planned
Recency of invitation (i.e. how recent)  Yes/No/Planned
Recency of participation (i.e. how recent)  Yes/No/Planned

Q26a  **Does the sample selection tool use any predictive or heuristic statistical model to estimate the amount of sample to draw, in order to fulfil the target number of interviews, based on participation history?**  Yes/No/Planned
Q27  Can sample selection include or take into account samples being sourced from other panels?  

a) Yes - if the sample records are imported  
b) Yes - without importing the records  
c) No  

Q28  Can you extract sample for administration in other survey platforms or to shared with other panels, which is anonymised, and in which you retain control of the contact?  

Yes/No/Planned  

Q29  Can you enrich your panel data with additional data…?  

By importing them from a survey  
By defining new profile variables and inviting panellists to provide the data  
By uploading them from an external dataset  
By any other methods (please specify)  

Open text  

Q30  What methods do you support for capturing and updating the participation history or survey outcome  

Automatically updated when used with our own survey tool  
Batch (or user-initiated) import from an external survey tool  
Real-time connection with the other survey tool via a Web services or similar interface  
Imported from email  

Yes/No/Planned  

Q31  When a survey is administered, can data from the survey be used  

To update the panellists response data with the survey outcome  
To suspend the panellist if necessary  
To update any profile information  
To extend profile information with new variable  

Yes/No/Planned
Q32 Do you offer any support for handling bounce-backs from email invitations? What do you provide? Open text

Q33 What methods do you support for data exchange or interoperability with other panel or survey software platforms?

- API or web services interface Yes/No/Planned
- Exchange of data and metadata Yes/No/Planned
- Triple S data import Yes/No/Planned
- Triple S data export Yes/No/Planned
- Simple CSV or Excel data import Yes/No/Planned
- Simple CSV or Excel data export Yes/No/Planned
- Other: please specify Open text

Q34 What information do you store in the panel database and is available to researchers or panel or community managers?

- Profile data Yes/No/Planned
- Original recruitment method or source Yes/No/Planned
- Sample selection history Yes/No/Planned
- Response history Yes/No/Planned
- Survey responses Yes/No/Planned
- User-defined data Yes/No/Planned

Q35 What measures of panel health do you provide, at a macro level, to measure and track

- Activity and responsiveness Yes/No/Planned
- Quality of response Yes/No/Planned
- Inactive or dormant panellists Yes/No/Planned
- Hyperactivity or multiple panel membership Yes/No/Planned
- Suspicious or undesirable activity Yes/No/Planned

Q36 Do you provide a dashboard interface to show the current state of the panel, and indicate areas that require Yes/No/Planned
Q37 **At an individual level, do you prove methods to evaluate or score the individual’s participation and engagement with regard to…?**

- Level of activity
- Quality of response
- Suspected inappropriate or abusive behaviour
- Any other measures you use (please specify)

Q38 **What measures do you have in place to identify and remove problematic panel members**

Q39 **Are there any other comments you wish to make, or any other features of the software you would consider are important, that we have not covered**