ZA5659

Online Panel Software
(Online Panel Research)

- Questionnaire -
Version 2: Update and review version prior to publication

Please check the answers you gave previously, and amend any to show the current state of your software.
Please note that one additional question has been added, at Q26a

NOTE! You can use [TAB] to navigate to each answer field

In case of any questions, please contact Tim Macer, meaning ltd
e-mail: tim@meaning.uk.com or tel. +44 20 3291 2931

Please type your response
or select from drop-down menu

Your consent
Data from this survey will be published in the forthcoming text "Online Panel Research" to be published by Wiley. It may also be presented or published by the author in other professional or scientific publications or forums.

We would like to be able to identify products that support particular capabilities, however, it is not essential that we do this, and your responses will be very valuable to our research if you choose not to identify your product.

Are you willing for us to identify your product in our reporting of the results? Please confirm:

If you select "no" we will treat your responses in confidence. Your product will not be identified in the results or named in the book

General capabilities

Q1 Which of these tools do you offer? (Please select all that apply)

Standalone panel management software capable of being used with other online research tools

Panel management integrated with your own online research tools

Software for running online research communities (that goes beyond basic panel management)

Q2 What is the underlying database platform?
Microsoft SQL Server
MySQL
Oracle
Other proprietary (please state)
Other open source (please state)

Q3 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

SECTION 1: PANEL RECRUITMENT

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 y (yes); n (no) or p (planned)

d) From other sources (please specify) open text

Q9 What is the effective limit to the number of panellists the panel may contain?
Enter number or state 'no effective limit' open text

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' open text

SECTION 2: PANEL ADMINISTRATION

Q11 What best describes the database design of your panel database?
a) A separate database for each panel a; b or c
b) A single database organised into any number of virtual, functionally independent panel databases

c) Something else open text

Q12 Does your software provide a specific interface for panel administrators to use as...?
A desktop graphical user interface y (yes); n (no) or p (planned)

A web based interface y (yes); n (no) or p (planned)

Other: specify open text

Q13 Do you provide any of these open interfaces to your panel database?
Please select all that apply

ODBC connectivity y (yes); n (no) or p (planned)

A documented API or SDK y (yes); n (no) or p (planned)

Set of stored procedures to access the database y (yes); n (no) or p (planned)

Web services interface y (yes); n (no) or p (planned)

ETL /Import support y (yes); n (no) or p (planned)

Published database schema y (yes); n (no) or p (planned)

Other: please specify open text
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?

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

SECTION 3: PANEL MEMBER EXPERIENCE

Q18  Are panel members able to update their profile information…?
   Please select all that apply
   Online, at any time
   Online, in response to an invitation or reminder
   By answering questions in a specific profile or update survey
   Via a mobile app

Q19  Can panel members be notified to update their profile information…?
   Please select all that apply
   Email
   SMS message
   Online notification when logged into the panel or community site
   Notifications via a mobile app

Q20  What tools, activities or items can the panel member access via their panel portal?
   Please select all that apply
   Surveys
   Polls
   Open discussion forums
<table>
<thead>
<tr>
<th>Blogs</th>
<th>y (yes); n (no) or p (planned)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co-creation tools</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>Public profile visible to other community members</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>Reward history</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>Reward redemption</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>One-to-one messages with panel administrators</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>One-to-one messages with other community members</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
</tbody>
</table>

Q21  Do you provide an integrated mobile app?  

Q22  If you offer a mobile application to panel members, which of these are also available via the mobile app?

<table>
<thead>
<tr>
<th>Surveys</th>
<th>y (yes); n (no) or p (planned)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polls</td>
<td>y (yes); n (no) or p (planned)</td>
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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

SECTION 4: SAMPLE SELECTION

Q24  Which of the following can you use to select samples?  
Please select all that apply

<table>
<thead>
<tr>
<th>Any profile data</th>
<th>y (yes); n (no) or p (planned)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous survey responses</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>Original recruitment source or method</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>Participation history and level of engagement</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
</tbody>
</table>

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:

Please select all that apply

<table>
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<th>Frequency of invitation</th>
<th>y (yes); n (no) or p (planned)</th>
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<tbody>
<tr>
<td>Frequency of participation</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>Recency of invitation (i.e. how recent)</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>Recency of participation (i.e. how recent)</td>
<td>y (yes); n (no) or p (planned)</td>
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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?

y (yes); n (no) or p (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 share with other panels, which is anonymised, and in which you retain control of the contact?

y (yes); n (no) or p (planned)

SECTION 5: DATA CAPTURE AND DATA LINKAGE

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

Please select all that apply

<table>
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<tr>
<th>By importing them from a survey</th>
<th>y (yes); n (no) or p (planned)</th>
</tr>
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<tbody>
<tr>
<td>By defining new profile variables and inviting panellists to provide the data</td>
<td>y (yes); n (no) or p (planned)</td>
</tr>
<tr>
<td>By uploading them from an external dataset</td>
<td>y (yes); n (no) or p (planned)</td>
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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: y (yes); n (no) or p (planned)
Imported from email: y (yes); n (no) or p (planned)

Q31 When a survey is administered, can data from the survey be used:
- To update the panellists response data with the survey outcome: y (yes); n (no) or p (planned)
- To suspend the panellist if necessary: y (yes); n (no) or p (planned)
- To update any profile information: y (yes); n (no) or p (planned)
- To extend profile information with new variable: y (yes); n (no) or p (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? Please select all that apply:
- API or web services interface: y (yes); n (no) or p (planned)
- Exchange of data and metadata: y (yes); n (no) or p (planned)
- Triple S data import: y (yes); n (no) or p (planned)
- Triple S data export: y (yes); n (no) or p (planned)
- Simple CSV or Excel data import: y (yes); n (no) or p (planned)
- Simple CSV or Excel data export: y (yes); n (no) or p (planned)
- Other: please specify open text

SECTION 6: ANALYTICS AND ACTIVE PANEL MANAGEMENT

Q34 What information do you store in the panel database and is available to researchers or panel or community managers? Please select all that apply:
- Profile data: y (yes); n (no) or p (planned)
- Original recruitment method or source: y (yes); n (no) or p (planned)
- Sample selection history: y (yes); n (no) or p (planned)
- Response history: y (yes); n (no) or p (planned)
- Survey responses: y (yes); n (no) or p (planned)
- User-defined data: y (yes); n (no) or p (planned)

Q35 What measures of panel health do you provide, at a macro level, to measure and track
Please select all that apply

- Activity and responsiveness
- Quality of response
- Inactive or dormant panellists
- Hyperactivity or multiple panel membership
- Suspicious or undesirable activity

**Q36** Do you provide a dashboard interface to show the current state of the panel, and indicate areas that require attention?

**Q37** At an individual level, do you prove methods to evaluate or score the individual’s participation and engagement with regard to...?

Please select all that apply

- 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

Please describe below

**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

Thank you for providing this valuable information to us.

If you would like to receive a summary of the findings, prior to the publication of the book, please provide your email address here:
Please send your completed survey to Tim Macer tim@meaning.uk.com

Please respond by 30 January 2013