

Consumer Custom Research Panels and Communities

Best Practice Guide



The 7 key principles of Consumer Custom Panels and Communities

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1. How will this guide help you?

Whether you are thinking of setting up a new online consumer panel, a research community or managing an existing one, this whitepaper sets out a clear, practical road map to steer you in the right direction.

Our 7 Principles of Custom Panel Community Management demystifies the process of developing your own research audience. It will help you improve the integrity and validity of your research audience and deliver greater depth of insight, by tuning into the true voice of the customer.



We will show you techniques to keep your custom panel or research community in good health and maintain information accuracy, while ensuring your members are engaged and motivated.

We highlight tried and tested quality control routines to standardise practices and improve consistency. We explain how to avoid the costly pitfalls of falling foul of legal compliance and Industry codes of practice.

This guide will help you to make better, more informed business decisions and save you money.

In particular, this report is aimed at:

- **Marketing, Research or Insight Directors** responsible for an organisation's research or customer engagement strategy, who want to understand the wider issues they should consider in implementing a panel or research community strategy
- **Research Managers/Insight teams** responsible for customer research seeking to engage with customers in a cost effective and efficient manner
- **Research/Digital Consultants** who have clients that would like to build a custom panel or research community, but have either limited or no practical experience

Key features of this guide:

- **Applicable** – all of the areas we discuss have been implemented in panel communities that we have built or managed, and are proven to be key features of success
- **Practical** – explains how the key principles can be implemented and why they are so important to quality
- **Leading edge** – incorporates the latest best practice advice from practical experience and the most up-to-date information

This guide concentrates on the principles of consumer panel and communities management. For help in creating and maintaining B2B panels and communities please refer to our best practice guide for [Advisory Councils and B2B panels](#).



2. Benefits

Investing in a custom panel or research community pays huge dividends to an organisation, not only in the cost saving that can be gained from conducting continuous research (savings of 40 to 50% not uncommon), but also in the fast turnaround insights the panel can offer.

In addition to this, a greater depth of knowledge can be built up from your panel or community members by linking previous responses to current ones, following customer journeys at key points and interact with your members on a more personal level. This makes the output more applicable to your organisation, helping you create a customer centric business strategy.

Of course many consumers appreciate their opinions being listened to, but have found it difficult to fit such non-essential activities into their busy lives. Recent advances in mobile technology are making panel or community participation more convenient, allowing for richer interactions.

Throughout this paper we talk about panels and communities, and many of the practical considerations we deal with are common to both. But they

are fundamentally different entities. A consumer panel is a 'one-to-many' research platform, allowing you to ask questions directly of panel members, whereas a research community will also allow 'peer-to-peer' interactions among members and moderators.

There are many shapes and sizes of panels and communities and there are significant benefits and drawbacks with each. There is no right or wrong in choosing either, simply which is most appropriate for your business and the objectives. We cover more on this subject in section 4.1.



3. Why is panel or community management so important?

If your panel or community is not representative, or the messages are distorted, then the impact on an organisation will be significant. Insights derived from panels or communities will drive product or service launches, ad campaigns, pricing strategies or other strategically important objectives.

It's therefore vital to be confident that the information coming out of the panel is accurate and robust and that it is being maintained properly, otherwise decisions being made can be skewed or inaccurate.

4. The 7 key principles of best practice

4.1 Principle 1 –Set up and design “Appropriate and appealing”

Key principle – choose the type of panel or community to meet your business and research needs. Understand your audience and what they need, and incorporate this in the design choice.

When setting up the online platform make sure the branding, mission statement and design gives the custom panel or community an identity which appeals to the target audience and is consistent with the overall objective of the programme.



*“...The design of a custom panel or research community **DOES NOT** need to follow a ‘one size fits all approach’”*

The design of a custom panel or community **DOES NOT** need to follow a ‘one size fits all approach’; the design should be determined according to the following factors:

- Who are the target audience?
- What feedback or advice is required?
- What are their needs, preferences and likely engagement?
- Which devices will they use (pc, laptop, tablet or mobile)?
- Project activities and project scoping: what

tasks do I want them to take part in and how often? (e.g. combination of surveys, polls, forum or bulletin board, depth interviews or focus groups)

- Do I want one platform for all interaction and possibly lose out on quality or combine platforms specialising in different types of tasks?
- How many members do I need for these tasks?
- What level of interaction are they likely to want, with our organisation or other members?



What are the pros and cons of each option?

	Custom panel without a member web portal	Custom panel with a member web area that they can log in to	Custom panel or research community which enables peer-to-peer interaction
Pros	Easier and lower cost setup	Acts as a focal point for members	Greater engagement
	Easier to manage	Members' area can be an exclusive place to host unique membership resources	Creates a community among members
	Most of the functionality of other options without the member area		Member networking
			Enables the development of brand advocates
Cons	Engagement limited to your direct communication	Slightly harder to set up	Harder to set up
	No central reference point for members	Increased cost of web portal and its management	Higher cost
		More content to manage	More to moderate and more content to manage
			Not everyone wants peer-to-peer engagement

With the platform in place, recruitment can start. We recommend the following approach:

- For your own customers target recruitment through available CRM data, which can be appended to the panel/ community member profile.
- Non-customers are more difficult as they have less brand affinity. However sampling from Nat-rep data sources can be a good interim approach.
- Use a registration questionnaire to include more relevant background information and fine tune screening and recruitment.
- Make sure your programme is compliant and all members sign up to relevant terms and conditions.
- This guide concentrates on the principles of consumer panel and communities management. For help in creating and maintaining B2B panels and communities please refer to our best practice guide for [Advisory Councils and B2B panels](#).



Action – choose the design carefully, customise it to your audience and sector

4.2 Principle 2 - Design and features – “Engaging environment”

Key principle – everyone is different and their motivations vary; understanding motivation allows you to choose the right design and ensure continuous engagement.

No two people are the same, and motivations for joining a panel or research community will be different. Preferences vary, from the communication channels they use, the degree of brand engagement they want, their desire to interact with strangers, to their likes and dislikes. That’s why some people will engage in a panel whereas others prefer the social interaction of a community.

Successfully engaging with a diverse group does present a challenge. By understanding member motivations and balancing that with business objectives, you can develop strategies to retain panellists and community members, and reduce churn.



Diagram 1 – Typical motivations for providing feedback

Understanding motivation

Incentives are not the only motivation for members. For many the opportunity to influence and be heard, or the simple desire to help an organisation by those loyal to the brand, can be much stronger motivating factors. In such cases the reward is often not in leaving feedback, but in knowing that the feedback will make a difference.

Best practice is to understand what actually will motivate different members as this will have a major impact upon the success of the panel or community. Inevitably some just want

incentives or rewards, (which can be difficult if you want to stay inside industry guidelines, see section 4.6), whereas others will be keen to engage with other members and the brand. It is crucial to be aware of the type of individual you are recruiting and their motivations, otherwise you can have a very biased opinion group.

Engaging with panel members is an ever evolving process but should always leave them with the feeling that they are important, that their views are valued, that they are listened to, and they have had some influence.



Action – understand panellist motivation and diversity. Listen to what will make a difference to them and devise an appropriate engagement strategy.



4.3 Principle 3 - Diversity “Balanced opinion”

Key principle – to manage the diversity within the panel or community, understand how representative and active each segment is.

As with any research, you need to know who you are engaging, with and how representative of the target audience the group is. Diversity and representation should therefore be carefully managed to ensure that feedback is balanced and robust and, if there is a bias, this is fully understood in the context of the wider marketplace.

When setting up a panel or community, organisations often prioritise recruitment from their own customer base. This is often easier, lower risk and more cost effective, but in order to obtain balanced opinion it may be useful to also include non-customers. This will help dilute the advocate effect and provide a broader view of the market. However the latter can be difficult, expensive and, as non-customers, they will be harder to recruit because of their lower brand affinity. Utilising access panel data or a good source of non-customers can be an effective compromise.



“...representation should be carefully managed to ensure that feedback is balanced and robust...”

The management of diversity and representativeness will vary according to the specific aims of each consumer panel or community. Other than balancing, or at least understanding, moti-

vational types, diversity should be balanced using common variables such as:

- Age
- Gender
- Region
- Life stage
- HH composition
- Customer segmentation
- Etc.

Standard demographics is just one way to manage the diversity, but there are numerous other variables that can be used. Consider using spend, customer value, or loyalty, all of which will have a bearing upon the balance of the panel. Selection of these criteria is one of the most important decisions and should reflect the specific nature of the panel or community.

It’s equally important to understand the proportions of each segment that are active or otherwise. Member composition overall may well be truly representative, however if certain segments have a louder voice, the “voice of the customer” can be easily distorted.

The value of segmentation in managing diversity

Segmentation is an extremely useful tool for managing diversity. The following example shows how using a segmentation system can highlight just how varied the composition can be from the UK norm. Chart 1 below shows how the profiles of certain defined groups compare to a predefined benchmark, in this case the UK population. The figures shown in this example are fictitious, but illustrate how easy it can be to engage with an unrepresentative group.

"...Segmentation is an extremely useful tool for managing diversity..."

In the chart, the profile of the UK population is represented in grey as the overall benchmark, whereas the organisation's customer profile is shown in darker orange, the profile of their panel is shown in lighter orange and the profile of those members who are actually active shown in yellow.

In this example, when listening to the 'voice of the customer', we can see that, all things being equal, the message would be skewed towards the opinions of the "Twilight subsistence" segment and against the "Grey perspectives", when comparing active members to the customer base or the UK population as a whole. By understanding this skew, the composition can be amended, or the information can be used to put some context to results or insights being extracted, or more likely both.

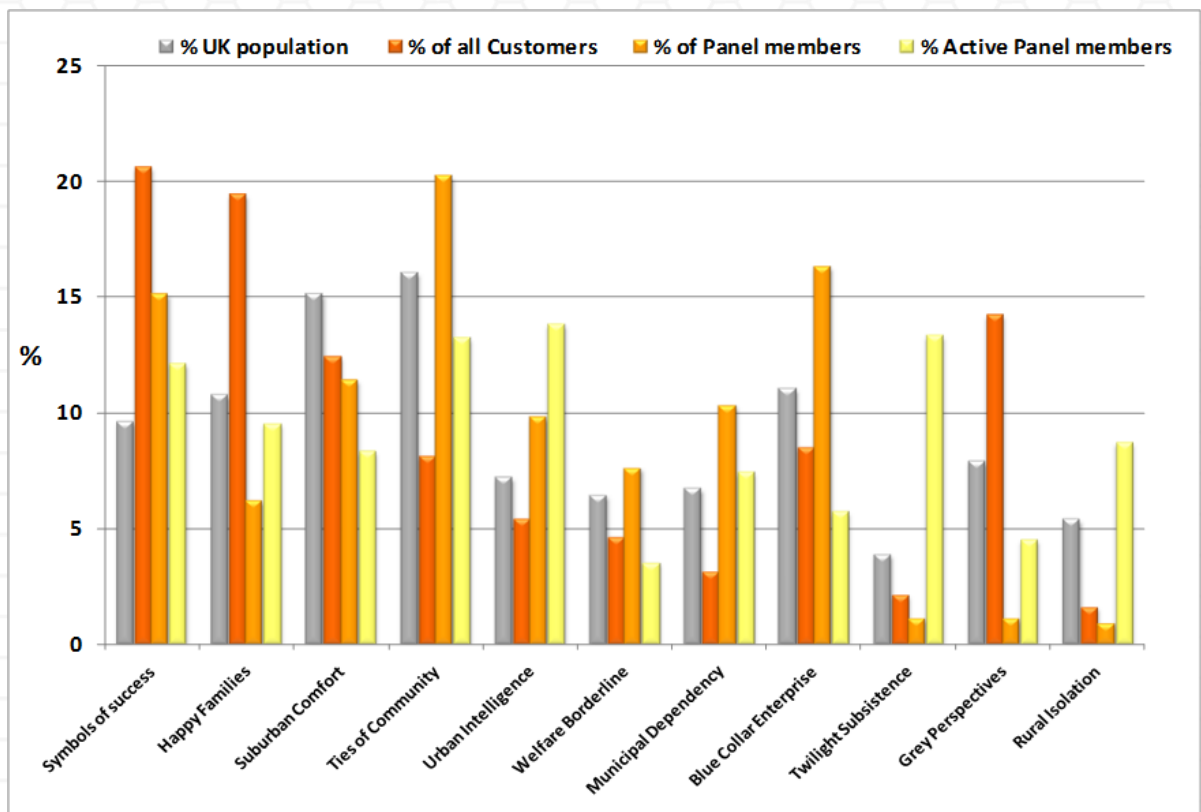


Chart 1 – engaging with unrepresentative groups

Churn and recruitment

Inevitably the composition of a custom panel or research community will change over time. It will be affected by:

- New people joining
- Existing people leaving
- Members having a break in participation
- The organisation's customer base changing
- Members' circumstances changing (i.e. their life stage, habits, hobbies etc. – their own profile)



"...A panel or research community may not have an absolutely consistent profile..."

But while the profile will change, provided it is monitored, understood and managed over time, you have the tools to explain and adjust any output. By managing the panel or research community in this way, the representation of certain segments may be adjusted through selective panel recruitment, to ensure the panel remains as balanced as possible.



Action – find the right KPI metrics for the panel or community. Monitor these against defined benchmarks, constantly review the profiles of active members and understand the dynamics of the panel in the context of results.



4.4 Principle 4 - Data management “Validation/CRM Data”

Key principle – it makes sense to use all the data that you have in order to examine feedback from all angles possible.

Validation

In the online world how do we know people are who they say they are? What’s concerning for parents everywhere is equally troubling for panel managers. People can easily create multiple email accounts, and unlike a physical postal address, there is little that obviously ties an email address to an individual. People can create multiple accounts on a panel or community using these different email addresses, which will impact on the integrity of the output



“...do we know people are who they say they are?”

It is therefore critical to know, with confidence, exactly who is on the panel or in the community. This is more of an issue in ‘open’ panels or communities, where anyone can register to join, whether a customer or not, as opposed to ‘invite only’ ones where membership is controlled more carefully. Regardless, it is best practice to check member validity.

Controlling panel member validity

Member validity can be controlled in a number of ways:

- Tightly control invitations so that only known individuals can join
- Re-capture information and validate against customer records

- Request unique customer reference numbers to check against the customer base
- Capture their IP address - useful in identifying their geographical location. In a panel only open to UK residents, someone with an IP address in India may be something to flag. It could be the person is legitimately away when they join the panel, but flagging such anomalies can be used for further investigation.



If the source of the member is unknown, i.e. you are recruiting from a Facebook page and

they may be a customer or they may not be, it is useful to devise a scoring system whereby you can allocate a confidence score against each member. For example, consider introducing a simple coding system like bronze, silver or gold membership. A panel or community member would be a bronze member on joining, but would move up to silver or gold based on validation checks completed or on the contributions they make.

Such a scoring system allows you to control member participation until their confidence score has reached the acceptable level, ensuring output is at least from validated individuals.

➔ Action – find the right KPI metrics for the panel or community. Monitor these against defined benchmarks, constantly review the profiles and profiles of active members and understand the dynamics of the panel in the context of results.

CRM data

By validating panel members or simply inviting them from the organisation's CRM database offers a wealth of customer information that can be used in and out of the panel environment.

This information can be linked to the members record, in real time/daily feeds/updates if necessary, and used in questionnaire routing, for example to target specific questions to relevant people, or in analysis. Any information not already known about the member can be asked in a registration questionnaire, with CRM data being automatically populated. Combining CRM data into the member's record avoids antagonising or alienating them by asking questions you should already know about.

Obviously when considering appending information it is important to ensure that all legal obligations of Data Protection, industry codes and best practices are being met. However it's worth considering the following information

when designing the database:

- Customer type or segmentation
- Customer spend (i.e. RFM)
- Products or services purchased
- Loyalty

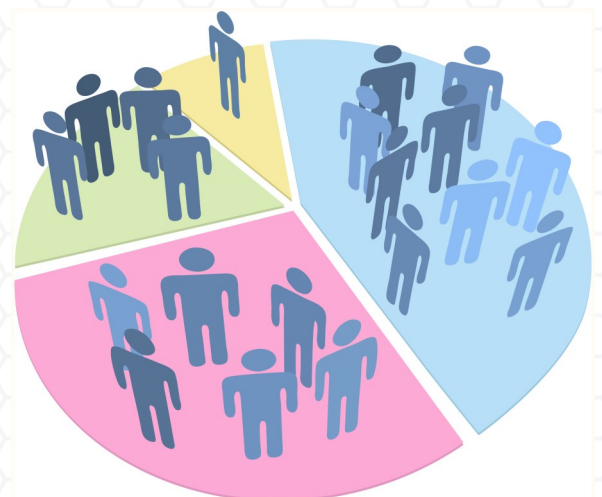


“Enriching the panel with customer information increases the value of the asset.”

Of course customer data quickly goes off, so you should implement a regular update programme, as we discuss next in Principle 5.



Action – define what information would provide additional value and insight. Check all legal obligations are being met in terms of DPA and other guidelines.



4.5 Principle 5 – Panel/ community health “Reporting and monitoring”

Key principle – Panel or community health can only be maintained by quality reporting of health indicators.

Monitoring

Quality reporting allows panel or community health to be tracked over time; diversity can be monitored and the robustness of the research can be underwritten.



“...key panel or community health indicators should be monitored and reported on a monthly basis ...”

Ideally a number of key panel or community health indicators should be monitored and reported on a monthly basis, to determine overall panel or community health. These include:

- Overall member volume
- Unsubscribe volume by month
- Volume of new members per month
- Recruitment channels
- Email status – valid emails, temporary or permanent errors
- % of members updating their profile in last 3, 6, 9, 12 and 24 months
- Activity levels – completing a survey in last 3, 6, 9, 12 and 24 months
- % of available members (subscribed, valid email, active in last 12 months)
- Survey response rates
- Invitation Completion ratios - % of panel-lists who have completed 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90% or 100% of the surveys they have been invited to

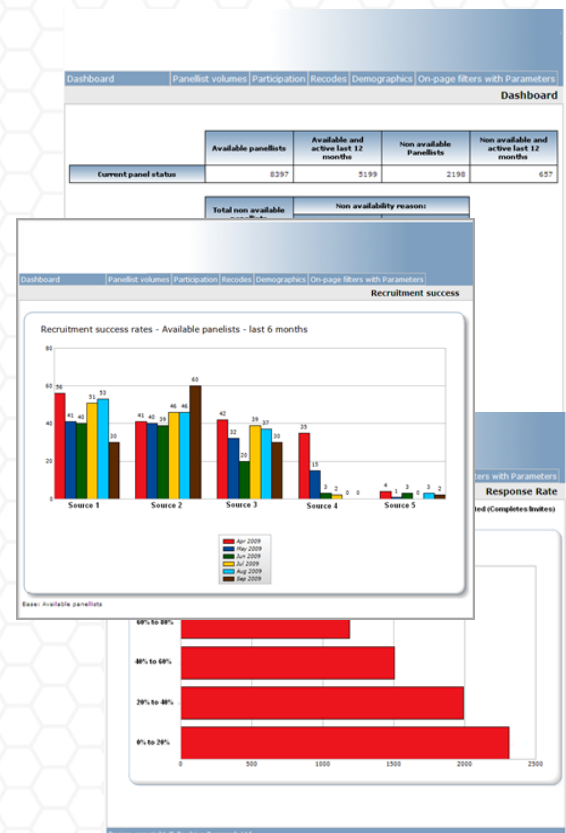


Chart 2 – Example Panel reports

Monitoring and benchmarking across a number of key panel or community health indices it shows whether the panel or community has sufficient diversity, representation, activity and member availability to be confident of offering up robust insights.

- Legal information
- Panel or community composition
- Data field population consistency checks

Panel/ community audits

In addition to monitoring overall panel or community health indices a detailed panel or community audit should be undertaken once every 12 months.

The audit should review all aspects of the panel or community and include:

- Site content



Action – create detailed panel or community reports. Monitor monthly against known benchmarks. Undertake necessary corrective action to keep panel or community health high.

4.6 Principle 6 - Compliance - *“Keeping it legal”*

Key principle – ensuring that all elements of the panel or community and any interaction with members meet current legislation and that there is consistency.

If you do nothing else, keep your panels or communities legal and compliant with local regulations.

UK panels or communities

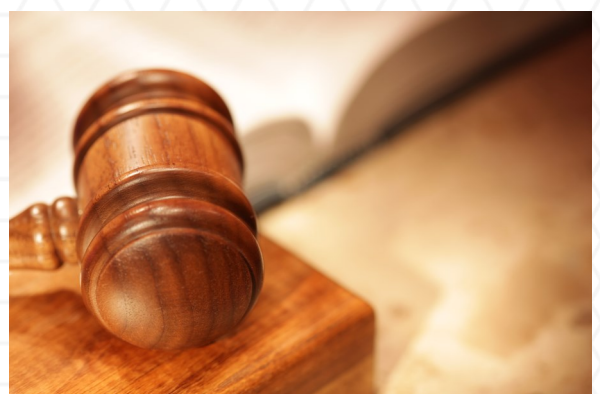
The issue is not just fulfilling key obligations of UK law but also Industry Codes of Practice and best practice guidelines such as:

- GDPR/ Data Protection Act 2018
- Secure storage of personal data
- Data processing and data transfers
- Opt in/ Unsubscribe requests
- MRS/ ESOMAR codes of practice
- Incentives and rewards - non organisation related, i.e. avoiding “SUGGING” (“Selling under the guise of research”)
- Prize draw rules
- Interviewing U16 year olds
- Gambling Act 2005
- Gambling, gaming, lottery, prize draws and sweepstakes
- Disability Discrimination Act (DDA)

- Web site access for blind and disabled users
- EU-US Privacy Shield - The Article 29 Working Party (A29WP) 2016

It must also be ensured that there is consistency across the panel or community website and any details provided in survey or member communications:

- Terms and Conditions of Membership
- Privacy Statements
- Frequently Asked Questions (FAQ)
- Prize Draw Rules (if applicable)



Failure to comply

Failing to meet these obligations can have serious implications for your brand, and can also impact on individuals within the organisation. Apart from legal challenges and potential loss of Industry membership, you'll be open industry criticism damage to brand reputation.

Multi region / country panels: compliance

Increasingly panels or communities comprise members from different countries and this can create legal issues, particularly in relation to where data is being stored i.e. inside or outside the EU/EEA, US, Asia etc.

Localised laws, codes of practice and Industry

Useful links

Information Commissioners Office (DPA) <https://ico.org.uk/for-organisations/guide-to-data-protection/>

Market Research Society <http://www.mrs.org.uk/standards/guidelines.htm>

ESOMAR <http://www.esomar.org/index.php/codes-guidelines.html>

Gambling Act 2005 http://www.opsi.gov.uk/Acts/acts2005/ukpga_20050019_en_1

Disability Discrimination Act (DDA) http://www.opsi.gov.uk/acts/acts1995/ukpga_19950050_en_1



"Failing to meet these obligations can have serious implications for your brand ..."

best practice need to be satisfied for each region that the panel operates and needs to use languages that enable native speakers to easily understand terms and conditions.

Useful compliance links

The following links provide some further detail on UK issues that may be relevant as part of best practice compliance:



Action – review the compliance of the panel or community extremely carefully. Monitor legislation changes and Industry best practice codes and make appropriate amendments. Check compliance regularly and at the very least yearly.

4.7 Principle 7 - Global panels or communities “International”

Key principle – ensuring that there is consistency, attention to different cultures and language enabled engagement.

Languages

When setting up international panels or research communities, attention needs to be given on preferred language of engagement. This means that while it may be useful for example to have an international research community, it may not be possible to combine certain markets where there is no shared language. Setting up separate panels or communities for each language can be laborious and require a significant amount of moderation. A good compromise can be to start small, perhaps with a selection of the most important markets or combining countries with a communal language and then growing market by market.



“Setting up separate panels or communities for each language can be laborious and require a significant amount of moderation.”

Don’t forget that all materials and content need to be translated and all engagement with the panel or community need to be in the relevant language. If in doubt, increase your budget by 10% to 20% over your estimate simply to take into account things that can easily be forgotten.

When setting up a global interactive research community you are going to need moderators who are fluent in all the relevant language. And if you are combining more than one country in an interactive community i.e. using a common language, you should also consider Time zones if any tasks are to be carried out simultaneously.



Another challenge often not considered is that some countries have more than one language, and that dialects or variants are not always the same. For example French, Canadian French or Swiss French all have a common base but they are not identical. Whilst the parent language may be easily understood the participants may be sensitive to perceived cultural slight.

Impact on timelines

While custom panels and research communities are frequently sold internally as a means to conduct quick turn-around research projects, translations of research materials can take several days, and local market translation checks a few more days on top. As a rule of thumb you will need an extra week for the translations and factor in extra days for making the necessary platform/ survey script changes to allow for implementation.

Cultural implications

Finally, you need to be consider and respect different cultural values. Incentives for taking part in a panel survey or community exercise may be appropriate for one market but counter-productive for another.



Action – Carefully assess the languages and prevailing cultural attitudes for each region. Understand the costs and benefits of tailoring panel communications to meet the expectation of members, and be aware of time implications.



5. How Beehive can help your organisation

We hope you have found this guide useful in addressing the key issues about Custom Panel or Research Community Management.

If you have any specific concerns that haven't been directly addressed, or require any further

assistance regarding custom panels or research communities, please email info@beehiveresearch.co.uk or call 0203 714 4174.



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