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## ► To cite this version:

Malaury Lemaître-Salmon. Designing a sample and survey management service to support quality methods for the ESS CRONOS 2 online panel. ESRA 2023 (European Survey Research Association), European Survey Research Association, Jul 2023, Milan, Italy. hal-04169478

**HAL Id: hal-04169478**

**<https://sciencespo.hal.science/hal-04169478v1>**

Submitted on 24 Jul 2023

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# Designing a sample and survey management service to support quality methods for the ESS CRONOS 2 online panel

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**European Survey Research Association Conference**  
21-07-2023

funded by the EC under SSHOC & ESS-SUSTAIN-2 (grants #823782 and #871063)



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## The project



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## Technical Stack



**What is this service for?**

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## Securing personal data

Minimized data flows.

Decentralised and privacy-compliant handling of panelist data.

User roles defined on a need-to-know basis.



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# Collaboration & orchestration

Centralised management of survey fielding orchestration:

- content edition monitoring
  - questionnaire and message edition
  - questionnaire and messages translation
- fieldwork coordination
  - questionnaire publication
  - sending invites & reminders



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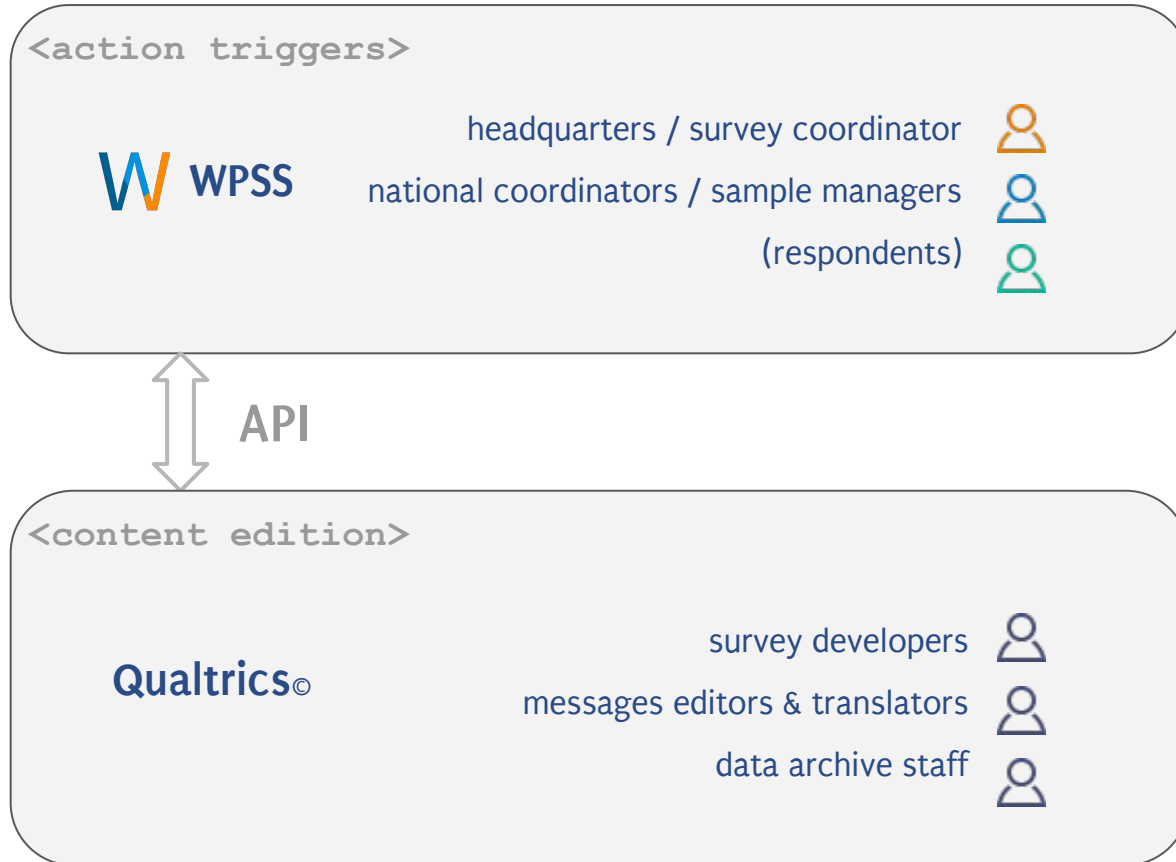
## Flexible contact modes

Messages can be send to panelists by email or short text messages.

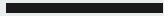
The two modes of contact can be intertwined.







# WPSS Features





# Headquarters

Entry point for headquarters managers

Panelists

29 

[View](#)

Panels

2 

[View](#)

National Coordinators

2 

[View](#)

Surveys



[View](#)

Individual links



[View](#)

Message deliveries



[View](#)



Import Export

Manage additional variables

Summary of language codes: 'FR' 'IT'

Filters Reset 29/29 panelists

ID	Age	Sex	Language	Email	Phone	Address	Internet use	Opt out	Opt out date	Opt out reason	Delete contact data	Delete survey data	Out of country	No incentive	No letter	No text
FR0	50	Male	FR	✓	✗	✗	Never	✗	None		✗	✗	✗	✗	✗	✗
FR1	30	Female	FR	✓	✗	✗	Only occasionally	✗	None		✗	✗	✗	✗	✗	✗
FR2	47	Other	FR	✓	✗	✗	A few times a week	✗	None		✗	✗	✗	✗	✗	✗
FR3	45	Refusal	FR	✓	✗	✗	Most days	✗	None		✗	✗	✗	✗	✗	✗
FR4	45	Don't know	FR	✓	✓	✗	Every day	✗	None		✗	✗	✗	✗	✗	✗
FR5	44	No answer	FR	✓	✓	✗	Refusal	✗	None		✗	✗	✗	✗	✗	✗
FR6	46	Male	FR	✓	✓	✗	Don't know	✗	None		✗	✗	✗	✗	✗	✗
FR7	29	Female	FR	✓	✓	✗	No answer	✗	None		✗	✗	✗	✗	✗	✗
FR8	46	Other	FR	✗	✓	✗	Never	✗	None		✗	✗	✗	✗	✗	✗
FR9	29	Refusal	FR	✗	✓	✗	Only occasionally	✗	None		✗	✗	✗	✗	✗	✗
FR10	36	Don't know	FR	✗	✓	✗	A few times a week	✗	None		✗	✗	✗	✗	✗	✗
FR11	44	No answer	FR	✗	✓	✗	Most days	✗	None		✗	✗	✗	✗	✗	✗
FR12	50	Male	FR	✗	✓	✗	Every day	✗	None		✗	✗	✗	✗	✗	✗
FR13	43	Female	FR	✓	✓	✗	Refusal	✗	None		✗	✗	✗	✗	✗	✗
FR14	47	Other	FR	✓	✓	✗	Don't know	✗	None		✗	✗	✗	✗	✗	✗



Headquarters →

## New set of individual links

Select a survey and targeted panels, for which individual links will be generated when appropriate

As a first step, the form below will allow you to select a survey and target panels, and give a short and meaningful description of the intended use of this link set. No links will be generated yet.

Generating the links will come as a separate step, at which point you will be asked to specify the link's expiry date. This can be done from the links set's detail page.

Panels \*

Panel\_1  
Panel\_2

Hold down the SHIFT key while clicking to select several panels

Description \*

First link

A concise way to unambiguously refer to this link set

Survey \*

Sample\_survey\_2023

Eligible surveys are those that are active and shared with the WPSS Qualtrics user.

Create

Cancel



Headquarters → Link sets → Detail →

## Generate links

<b>UID</b>	bf8e7c54
<b>Description</b>	First link
<b>Survey</b>	Sample_survey_2023
<b>Panels</b>	<ul style="list-style-type: none"><li>• Panel_1</li><li>• Panel_2</li></ul>

Expiration date \*

YYYY-MM-DD

Generate

Cancel



Headquarters → Message deliveries →

## Create a message delivery

Deliver a set of individual links to their recipients using an email or SMS drafted and translated on Qualtrics. A fallback message can optionally be added.

Link set \*

(b593d7dd) second\_test

Target recipients \*

All

Message \*

Super invite email

From Qualtrics library

Subject \*

Super subject message

From Qualtrics library

Create

Headquarters → Message deliveries →

## Message delivery details

Detailed summary of this message delivery's settings

UID	f1555fae
Type	Email
Target	All
Link set	second_test
Subject	Super subject message
Message	Super invite email

Add fallback message

Send

Delete



Headquarters → Link sets →

## Details

Detailed summary of this link set's characteristics

<b>UID</b>	<b>b593d7dd</b>
<b>Description</b>	second_test
<b>Survey</b>	TestSurvey
<b>Number of links</b>	29
<b>Generated at</b>	2023-06-28 14h05
<b>Expire in</b>	2 months, 3 weeks
<b>In progress</b>	10
<b>Finished</b>	5

### Detailed stats

Panel	Not Started	Started	Partially Finished	Finished	Total
Panel_2	10	3	0	2	15
Panel_1	4	7	0	3	14
<b>Total</b>	<b>14</b>	<b>10</b>	<b>0</b>	<b>5</b>	<b>29</b>





Headquarters → Message deliveries →

## Message delivery details

Detailed summary of this message delivery's settings

UID	f1bbfef2
Type	Email
Target	All
Link set	second_test
Subject	Super subject message
Message	Super invite email
Send date	2023-06-28 14h07
Fallback	(9d9bc39e) nouveau sms

### Stats

Panel	Current Panelists	Attempted	Delivered	Opened (at least)	Soft Bounce	Hard Bounce	Other Failures
Panel_2	15	10	8	4	1	1	0
Panel_1	14	9	9	0	0	0	0
Total	29	19	17	4	1	1	0



National coordinators → Panels →

## Panel\_2

Panel information

Panelists

15 

[View](#)

Import history



[View](#)

Individual Links



[View](#)

Message deliveries



[View](#)

Settings



[View](#)



+ New panelist Import Export

Summary of language codes: 'FR'

Filters  15/15 panelists

ID	First name	Last name	Sex	Email	Phone	Language	State	Additional variables	Edit
FR0	Anthony	Phillips	Male	panelist_20@qxsms.com	None	FR	Never logged in		
FR1	Angela	Castillo	Female	panelist_21@qxsms.com	None	FR	Never logged in		
FR2	Heather	Rosales	Other	panelist_22@qxsms.com	None	FR	Never logged in		
FR3	Matthew	Wyatt	Refusal	panelist_23@qxsms.com	None	FR	Never logged in		
FR4	William	Gray	Don't know	panelist_24@qxsms.com	+380977327312	FR	Never logged in		
FR5	Cory	Reyes	No answer	panelist_25@qxsms.com	+36318869465	FR	Never logged in		
FR6	Dawn	Williams	Male	panelist_26@qxsms.com	+38644599298	FR	Never logged in		
FR7	Robert	Brown	Female	panelist_27@qxsms.com	+380621079598	FR	Never logged in		
FR8	Debbie	Sanders	Other	None	+37167799788	FR	Never logged in		
FR9	Christopher	Patterson	Refusal	None	+38533589865	FR	Never logged in		
FR10	Sarah	Ramirez	Don't know	None	+33479671936	FR	Never logged in		
FR11	Jennifer	Lara	No answer	None	+17405923612	FR	Never logged in		
FR12	Steven	Curtis	Male	None	+33355236302	FR	Never logged in		
FR13	Alison	Thompson	Female	panelist_33@qxsms.com	+306934707229	FR	Never logged in		
FR14	Joshua	Wiley	Other	panelist_34@qxsms.com	+38532828915	FR	Never logged in		

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## WPSS key points

Transparency of process

Complete control of the study

Precise synchronisation of all process

Effective internationalization

GDPR principles strictly implemented

Contact mode flexibility

Panelist portal availability

Comprehensive support

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## Critical feedback

WPSS would require substantial rewriting to work with a survey platform other than Qualtrics.

The integration of Qualtrics was necessary to meet project deadlines and due to its widespread use in the academic community.

The use of the Qualtrics API presents challenges, including a lack of precise support and unexpected changes.

Errors with the Qualtrics server and support issues were encountered.

# Thank you

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