

# APPLYING A PANEL MEMBER-FIRST APPROACH ON KNOWLEDGEPANEL

*Federal Computer Assisted Survey Information Collection (FedCASIC) Workshops 2024*

Nick Bertoni  
Vice President, KnowledgePanel Operations

April 17, 2024

**GAME CHANGERS**



# Why use a Panel Member-First approach?

- Panel Members are our lifeblood – without them, there is no KnowledgePanel
- Everything that Panel Members see from us must be intentionally designed with them and their experience in mind
- We need to be mindful of the burden we are placing on Panel Members with what we are asking them to do and how we are asking them to do it
- It is difficult and expensive to recruit and retain our Panel Members, so we need to take good care of them when they commit to joining KnowledgePanel
- Managing the Panel Member experience is essential to achieve optimal panel performance

# Measuring panel performance – benchmarking

- Quality of online panels and data collection in general is often evaluated using benchmarking
- Compare point estimates to those from federal and other surveys considered to have “Gold Standard” methodology and accuracy

# Measuring panel performance – benchmarking

- KnowledgePanel vaccination rates align with CDC estimates

Table 2. Comparison of COVID-19 vaccination coverage between Ipsos KnowledgePanel and vaccine administration data (IIS) nationally, and by sex and age group, United States, March 5–8, 2021

	Ipsos (March 5–8)		IIS*	Simple coverage difference between Ipsos and IIS*		
	%	95% CI	%	Percentage point difference	95% lower bound	95% upper bound
<b>Characteristics</b>						
Total	25.7	(22.9–28.7)	25.0	0.7	-2.1	3.6
<b>Sex</b>						
Female	29.2	(25.0–33.7)	27.6	1.6	-2.6	5.9
Male	22.1	(18.5–26.1)	21.6	0.5	-3.2	4.2
<b>Age Group</b>						
18–49 years	14.6	(11.4–18.1)	13.1	1.4	-1.8	4.7
50–64 years	17.7	(13.2–23.0)	19.1	-1.4	-6.1	3.3
≥65 years	63.4	(56.3–70.2)	59.8	3.6	-3.2	10.4

Abbreviations: CI=confidence interval, IIS=immunization information system.

\* Based on the COVID-19 vaccine administration data (1), with vaccination coverage estimates using same denominator as the HPS estimates and using the median vaccination coverage from March 5–8, 2021.

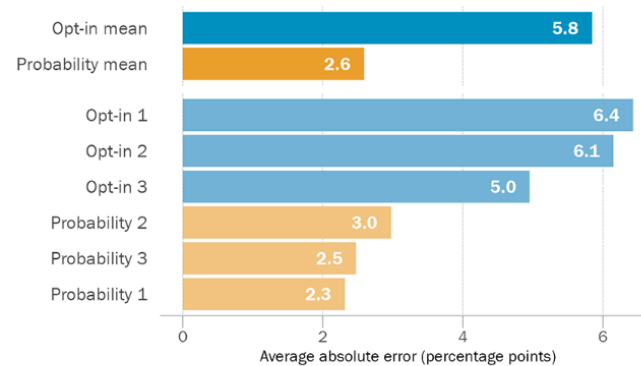
<https://www.cdc.gov/vaccines/imz-managers/coverage/adultvaxview/pubs-resources/covid19-coverage-estimates-comparison.html#table-02>

# Measuring panel performance – benchmarking

- Ipsos conducted a benchmarking study for Pew Research Center in 2021 analyzing average absolute error on 28 benchmark variables
- Compared probability and non-probability sample sources

## Average error on online opt-in samples was twice that of probability-based panels

Average absolute error on 28 benchmark variables for estimates among U.S. adults



Source: Pew Research Center analysis of six online samples surveyed June 14-July 21, 2021.

PEW RESEARCH CENTER

<https://www.pewresearch.org/methods/2023/09/07/comparing-two-types-of-online-survey-samples/>

# Respondent-centric best practices that are already well-established

- Mobile optimization for device-agnostic surveys
- Limit respondent burden / number of surveys sent
- Avoid excessively long surveys
- Pay respondents for their time
- Treat respondents as you would want to be treated (Golden Rule)

# Preventing attrition on KnowledgePanel

# KnowledgePanel attrition prevention activities - Overview

- Retention Stories - sent out via automated process after a panel member hits their 2-month and 6-month tenure mark in the panel
  - This timing is intentional to avoid early attrition from new Panel Members
  - We also send an automated greeting to Panel Members on their birthday and on their 1-year anniversary as a Panel Member
- Connection Prompting - used to follow up with people who have not yet responded to their invitation to take the Core Profile survey, which is the final step needed to be eligible to be sampled for client surveys
  - Live calls are made to try to reach these nonrespondents and convince them to complete the process by taking the survey



# KnowledgePanel attrition prevention activities - Overview

- Missed 2 / Missed 4 Prompting - Panel Members who miss 2 consecutive surveys are sent an email to check in with them. The same process is followed when someone fails to respond to 4 consecutive surveys.
  - This timing is intentional to avoid early attrition from new Panel Members
  - A live or IVR call can also be used in place of an email

**Are there other panel management strategies that can directly enhance panel performance, even if they are harder to define or measure?**

# KnowledgePanel attrition prevention activities – Redesigning for Panel Member-First approach

- Tone
  - Pivot from a formal/academic tone to a more casual, conversational tone
- Cadence
  - Add in an extra point of contact between 2- and 6- month Retention Stories
- Content
  - Provide additional information and encouragement on how to redeem points for rewards
  - New Instant Poll feature for measurement of the Panel Member's experience/satisfaction with KnowledgePanel
- Incentivization
  - Give a raise to underrepresented groups
  - Non-contingent spot bonuses
  - Education to increase incentive redemption

# KnowledgePanel attrition prevention activities – Redesigning for Panel-Member First approach

- 100 ways to use your points – sent at two-month tenure mark (Retention Story)

KnowledgePanel®  
The opportunity to be heard.

---

Hi Rachel,

As a KnowledgePanel Member you have over 100 products to purchase using your points. Why not go shopping - you earned it!

Visit <http://members.knowledgepanel.com> today to view and redeem your rewards. After logging in to the site, click on "My Points", then choose your reward.

Thanks!  
The KnowledgePanel Team

---

# KnowledgePanel attrition prevention activities – Redesigning for Panel-Member First approach

- Sent after two missed surveys

## Original

KnowledgePanel®  
The opportunity to be heard.

---

Dear Rachel,

We greatly appreciate your help with our research - your involvement is critical to our success. However, we noticed that you haven't completed your last couple of surveys. If you are having problems completing your surveys or have any questions, please call us at 1-800-782-6899 or send us an email at [support@knowledgepanel.com](mailto:support@knowledgepanel.com).

Remember - for every survey session you complete, you earn Member Points that can be redeemed for cash. You can take your surveys (or check your Member Points total) by logging in to our Panel Member website:

<http://members.knowledgepanel.com>

Thank you again for your help; we look forward to hearing from you soon!

The KnowledgePanel Team

---

## Revised

KnowledgePanel®  
The opportunity to be heard.

---

Hi Rachel,

We just wanted to thank you for helping us with our research. We are guessing you have a lot going on, and that getting surveyed is just about at the bottom of the list of fun things to do. Hopefully, the fact that what you say affects millions of people makes you feel kind of special. Not that you would let that kind of power go to your head or anything.

Honestly, we really appreciate you sticking with it and responding in what they call a "timely fashion". Because with great power, comes great responsibility, and you seem to be nailing both.

You can access any outstanding surveys by logging in to the member website: <https://members.knowledgepanel.com>.

Thanks!

The KnowledgePanel Team

---

# KnowledgePanel attrition prevention activities – Redesigning for Panel-Member First approach

- Sent after four missed surveys

## Original

KnowledgePanel®  
The opportunity to be heard.

---

Dear Rachel,

We noticed that you haven't completed the last few surveys we've sent you. Your thoughts and opinions are important to us; that's why we give you Member Points - which are redeemable for cash - for every survey session you complete. However, you cannot earn points if you don't participate.

Remember - being a member of the Panel means that your opinion counts. We hope you will start taking advantage of this unusual opportunity once more. You can access any outstanding surveys by logging in to the member website: <https://members.knowledgepanel.com>.

We appreciate your help, and we are glad to have you as a Panel Member. If you have any questions, please feel free to call us at 1-800-782-6899 or send us an e-mail at [support@knowledgepanel.com](mailto:support@knowledgepanel.com).

Regards,  
The KnowledgePanel Team

---

## Revised

KnowledgePanel®  
The opportunity to be heard.

---

Hi Rachel,

We'll make this quick.

You have a few surveys pending and we don't want you to miss out on earning your points for completing your latest survey session. (That's like throwing away money!

Please go to <https://members.knowledgepanel.com> now to complete your surveys, then check out your [KnowledgePanel Rewards Marketplace](#) to redeem your points.

Thanks again.  
The KnowledgePanel Team

---

# Panel-Member First Approach in Writing

- KnowledgePanel has a written commitment to our Panel Members that is displayed in our member portal

## KnowledgePanel Member "Bill of Rights"

We at Ipsos agree to:

- Never try to sell you anything.
- Never misrepresent ourselves or what we are doing.
- Provide your survey responses and other information to our clients in anonymous form only, unless you have given your express permission. (We generally do not seek such permission.)
- Make sure that your KnowledgePanel survey workload remains reasonable.
- Provide ongoing support and technical advice relating to KnowledgePanel participation.
- Respect your decision to not answer survey questions if you so choose.
- Do our best to ensure your participation in KnowledgePanel is a pleasant experience.

**Panel Member-First is more than just clever emails – it is the experience that matters the most**



# Managing the Panel Member experience

- Surveys that are not overly burdensome
  - Limit longer question batteries
  - Avoid obnoxious grids with too many columns (even better, avoid altogether!)
- Do not attempt to deceive anyone
  - Frame hypotheticals or message testing as such
- Survey invites and reminders should be spaced out
  - Nobody wants to have their inbox bombarded multiple times a day or on consecutive days
- Offer top-notch support
  - Respond quickly to inquiries and technical issues
  - Make sure respondents get their promised incentives

How can we tell if any of this new approach is helping?




# KnowledgePanel completion rates at four-year high

- Broke trend of declining completion rates over previous two years
- Highest completion rates since began tracking regularly in 2020

Completion Rate of Surveys that Fielded for 5+ Days - Comparison by year								
	Overall	English	Spanish	Average Completion Rate for Key Demos				
	Average Completion Rate	Average Completion Rate	Average Completion Rate	60+	Low Income	Minorities	Low Education	Black or African American, Non-Hispanic
2020	60%	60%	45%	73%	51%	52%	55%	51%
↓ 2021	58%	59%	40%	70%	50%	50%	53%	50%
↓ 2022	55%	56%	39%	68%	49%	49%	51%	50%
↑ 2023	62%	63%	41%	72%	56%	56%	59%	59%

# KnowledgePanel attrition rates at three-year low

- Broke trend of increasing attrition rates over previous two years
- Lowest attrition rates since 2020

Average Monthly Attrition Rates - Comparison by year								
	Overall	English	Spanish	18-29	HS or Less Education	Black non-Hispanic	Hispanic	Rare Groups
2020	3.5%	3.5%	4.2%	6.1%	5.2%	4.7%	4.7%	7.7%
 2021	4.7%	4.5%	6.6%	7.9%	7.1%	6.0%	6.5%	11.3%
 2022	4.8%	4.7%	6.9%	8.5%	7.0%	6.2%	6.8%	10.7%
 2023	3.7%	3.6%	4.9%	6.4%	5.5%	4.8%	5.1%	8.3%

# Key Takeaways

# Key Takeaways to using a Panel-Member First Approach

**1**

Be intentional with your messaging

---

**2**

Consider tone and cadence in addition to content

---

**3**

Never expect Panel Members to work for free

---

**4**

Non-contingent bonuses can help

---

**5**

Follow the Golden Rule

---

# THANK YOU!

**Nick Bertoni**

Vice President, KnowledgePanel Operations

[Nick.Bertoni@ipsos.com](mailto:Nick.Bertoni@ipsos.com)

