



# Amplifying the Voice of Panel Members with the help of Gen AI to Improve Recruitment Materials

**Nick Bertoni**

**Ipsos Public Affairs**

**CIPHER 2025**

Wednesday, 26 February through Friday, 28 February 2025

USC Capital Campus in Washington, D.C.

1771 N St NW | Washington, DC 20036



# Introduction

KnowledgePanel uses ABS methodology as the primary method to recruit new members to the panel.

There is a great deal of literature and research from the survey community about testing new material styles and designs.

But even with all of that information available, the question remains...

*How do we really know how potential panel members feel about and react towards our materials???*

# Focus Groups!



*Image generated by Ipsos Facto*

# Study background

We may be panel management experts, and we may know how to survey our target populations...

...but survey experts are typically NOT representative of the people they seek to recruit and retain more of in our panels.

Why not go straight to the source?!



*Image generated by Ipsos Facto*

# Method

# Methodology

- Invite current KnowledgePanel members to evaluate recruitment materials
  - Select members empaneled prior to the current materials being used
  - Focus on subgroups of interest
  - Invite to participate in a 60-minute, virtual interview
  - Offer incentive worth \$50 for their participation
  - Mail sealed packet with four different materials ahead of time with instructions not to open
    - 6x9 large window envelope with visible \$1 bill, standard postcard, tear-open postcard, #10 window envelope

# Methodology

- Conduct recorded and transcribed interviews via Microsoft Teams Nov. 19 – Nov. 26, 2024
  - Five interviews from people with high school or less educational attainment and mix of age, sex, and race/ethnicity
  - Led by interviewer to review one document at a time to evaluate them
  - 214 pages of transcripts from 209 minutes of interviews
- Use Ipsos Facto – the proprietary Gen AI platform built and maintained by Ipsos – to analyze transcripts and provide key themes
  - Summarized into 2 pages of bullet point highlights

# Results



# Results – select feedback from Ipsos Facto

**\* \*\*Emphasize Rewards:\*\*** Clearly and consistently highlight the rewards system, focusing on points rather than dollar amounts. Address the discrepancy between the initial \$20.00 incentive and subsequent \$1.00 rewards.

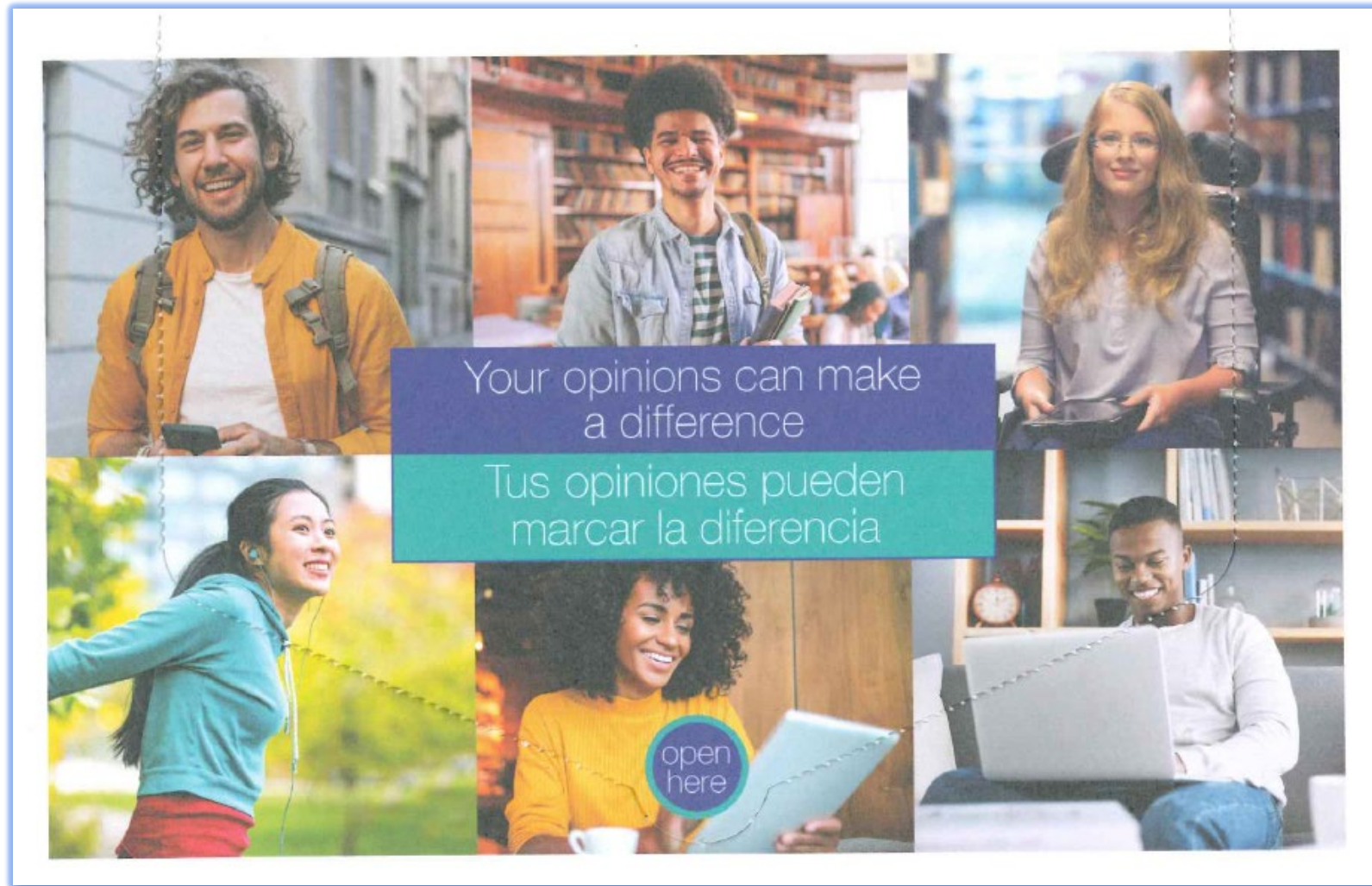
**\* \*\*Improve Postcard Design:\*\*** **Redesign the tear-open postcard for easier opening.** Consider a different format altogether to avoid the "junk mail" perception. Include information about rewards on both postcards.

**\* \*\*Enhance Envelope Appeal:\*\*** Add design elements, text about rewards, or images to the back of the larger envelope and to the front and back of the smaller envelope.

**\* \*\*Expand Language Options:\*\*** Offer materials in more languages beyond English and Spanish, potentially using QR codes to link to translated content.

**\* \*\*Manage Expectations:\*\*** Inform potential members about the range of survey topics, including potentially sensitive or challenging ones.

# Original tear-open postcard



# Revised tear-open postcard



# Discussion

# Discussion

- Implementing design changes from direct feedback from the type people I want to recruit led to a **0.5%-point increase in yield**
- Using Ipsos Facto Gen AI platform condensed about 3.5 hours of video into a transcript of highlights that is less than a 10-minute read
  - Imagine the time savings doing this at a higher volume
- With the proprietary platform, there are no privacy concerns about potentially sharing PII or training other public models
- While we all may be experts in our fields – we may not know as much as we think we do...

**Thank you!**

**Nick Bertoni**

**Nick.Bertoni@ipsos.com**



**Ipsos U.S. Public Affairs is a  
Charter Member of  
AAPOR's Transparency Initiative**

