



Building a Successful Convenience Panel

By Brian Wansink and Seymour Sudman

A new approach offers quick answers to research questions.

Convenience panels are called by different names depending on how they're being used. Companies often call them "pilot panels" because they're used for pilot studies or for measurement development. Academics call them "academic panels," not surprisingly, but can formally name them based on the focus of their research. But all convenience panels tend to have similar purposes—to easily

Executive Summary

There are times when generalizability and projectability are not the goals of a study. In these cases, a panel of conveniently available non-representative consumers—a convenience panel—can offer ease and speed of access. Because convenience panels tend to be locally focused, they can also offer the opportunity to pre-screen people for focus groups, in-depth interviews, and face-to-face experimental tasks.

and quickly generate data that will be helpful in questionnaire design, idea generation, or theory testing.

Convenience panels are useful when you're not trying to project from the panel to a general population. They can provide quick turnaround and follow-up feedback on the phone (or face-to-face) as to what questions seemed difficult to answer. In addition, people in these panels tend to be experienced and "well-behaved," and a higher percentage of returned responses appear to be usable. Although such panelists may not be representative of a general population, generalizing is not the goal here. Instead, experienced panelists enable easy troubleshooting of problem areas, more effective idea generation, and less noisy experimental results.

Pre-selecting for interviews or recruiting for experiments. Sometimes it's important to have face-to-face meetings with panelists, especially when follow-up questions need to be answered in a focus group or through in-depth interviews. The closer panelists live to a central, convenient facility, the more easily this can happen. Previous records from panelists can be used to electronically pre-screen them before interviews. Suppose you're interested in interviewing consumers who have swimming pools. Past information on panelists can indicate which ones have swimming pools, and they can quickly be pre-screened on this basis. Similarly, panelists can also be pre-screened on the basis of the type of person they are (e.g., brand-loyal, high need for cognition, impulse shopper).

Generating ideas and conducting experimental tests. Suppose we're trying to determine who the gatekeeper of food purchases is within a household. (i.e., who's the meal planner vs. the meal eater?) Using a convenience panel can help us explore some preliminary thinking or stimulate further brainstorming. If the answers are thought to be different with different populations, or if they're important enough to generalize, a full panel study can be more parsimoniously conducted at a later time.

A well-trained panel can be given a wide range of open-ended questions along with scaled questions and frequency questions. A general method in exploring a new context or research area is to ask dyadic questions, such as "When do you ____?" and then asking "When do you not ____?" In both cases, a series of scaled questions can be asked about each of the events. Similarly, asking people to describe recent scenarios (e.g., the last time they bought something on impulse or the

most recent comfort food they ate) and to answer scaled questions related to it can provide great insights for exploratory analysis and thinking.

Improving data quality. There's always a trade-off between accuracy and cost. In academic-related methodology studies, a premium is placed on a panelist's accuracy. Panels can screen or pre-select consumers based on how careful and accurate they are, which can be useful whenever a situation places a premium on low error variance. This can be easily and statistically accomplished by checking an interviewer's consistency in answering questions across times. Response to reverse-scaled items of a similar nature can provide an indication of how careful they are, and an analysis of missing data can give some indication of diligence.

When managed well, convenience panels help provide a certain guarantee about data quality. Panelists with whom a researcher has regular contact can be more useful, patient, and precise than one who's merely "doing it for the money." This makes them loyal panelists who can be called on more frequently than would be the case with more general panels.

Recruiting Panelists

For the most part, convenience panelists live close to a research facility and are quickly and inexpensively accessible by phone and in person. For pilot panels, a larger percentage can be from outside the area if going to a central facility doesn't place too much of a burden on those who do live in the area.

Send recruitment mailings. Within a specified area, mail solicitations can be a good way to purchase mailing lists and recruit people. The solicitation letter must explain the general purpose of this survey, how the data will be used, and what they will receive for compensation as well as an assurance that their privacy will not be compromised. In these cases, the solicitation mailing will include a business reply envelope and a brief questionnaire to help with pre-screening for future studies. Many people want to be assured their names and addresses won't be sold to companies. If a small amount of money is included, it's not uncommon for a solicited response rate to be as high as 15% to 20%.

Advertise and distribute fliers. Display ads and help wanted ads are commonly used to recruit local panels. While this successfully locates eager panelists, these panelists aren't always ideal. Many people reading these ads are looking for extra money and will treat the panel as a means to an end. Panelists recruited through advertisements have a higher burn-out rate and produce a slightly lower percentage of usable questionnaires than those recruited randomly through the mail.

Fliers are less expensive than ads, but their success is wholly dependent on where they're placed. The most successful fliers are those placed on bulletin boards at churches and in community centers. The people recruited through these fliers are sincere and often end up being long-term panelists. Fliers placed on bulletin boards in grocery stores tend to generate a reasonably large response, but the response quality is lower. Fliers placed in laundromats generate high response, but the panelists have a high level of attrition from the panel. In general, there have been uneven responses about the quality of people recruited through

Internet bulletin boards. This appears to be the least successful recruitment method at this time.

Send recruitment e-mails. When dealing with a large central community (e.g., university or large company), the easiest way to recruit is through e-mail. Communications directed toward staff—secretaries and administrative assistants—receive decent levels of response. Yet, because of perceived issues of hierarchical power, these e-mails need to be delicately written. It's important to decouple the panel from the institution and from any confusion as to whether they "have" to be involved. The best approach is one emphasizing that being a panelist is a reasonably amusing way to spend some time and that it's appreciated, convenient, and compensated. Before sending this message, it's important to personally show it to a number of the people in the target population to make sure it communicates effectively, persuasively, and inoffensively.

Recruit in PTAs and church groups. One of the most successful methods of recruiting panelists is in groups. Two groups successfully used have been elementary school Parent Teacher Associations (PTA) and church groups.

These organizations are always involved in fundraisers to buy school supplies or to send kids to church camp and are often looking for painless fundraising ideas. One solution for this dilemma is the fundraising survey. Simply put, for each person the PTA or church can get to complete a qualifying survey, the organization is given \$8 to \$12. They do the basic pre-screening, and when all these criteria are met, long-term panelists will be recruited.

On the last page of the survey, people have the opportunity to join the panel. They're told that subsequent research will be conducted in the area and they'll receive compensation to be involved in future surveys. It's important to refer to the valued nature of the group and the willingness to disclose what is learned (via the Web site).

Compensating Panelists

Large panel companies compensate consumers using tangible rewards such as gifts, cash, lotteries, or redemption points. While some institutions using convenience panels have tried to use intangible rewards, such as "membership prestige," copies of results, and pats on the back, the more successful ones use a combination of tangible and intangible rewards. Company panels need to provide a slightly higher tangible-to-intangible mix of rewards than universities (especially compared to state universities). But even universities need to offer some tangible reward to keep panelists happy and involved.

A reasonably good payment rule is to pay 1.0 to 1.5 times the minimum wage. To use this benchmark, first determine how long it will take a reasonable person to complete the questionnaire. It's important not to use the "mean" completion time, but to instead use an estimate of the "reasonable completion time."

The reasonable completion time is the time it takes for 70% of the test respondents (the 70th percentile) to complete the particular panel survey instrument. Based on this number of minutes, using 1.0 to 1.5 times the minimum wage will give a range of what is a reasonable incentive for consumers. However, this changes throughout the year. If a researcher wishes to keep a

consistent response rate across the year, the reasonable range will vary throughout the year. (See illustration below.)

What determines what end of the pay scale is used? This depends on who the sample is, what their time is worth, where they're located, what the institution is (company vs. university), the topic, and the interest level in the panels survey. The Food Psychology Panel at the University of Illinois, for instance, gen-

What do panelists expect to get paid?

January	1.0-1.5 x the minimum wage
February	1.0-1.5 x the minimum wage
March	1.0-1.5 x the minimum wage
April	1.0-1.5 x the minimum wage
May	1.3-1.8 x the minimum wage
June	1.5-2.0 x the minimum wage
July	1.5-2.0 x the minimum wage
August	1.5-2.0 x the minimum wage
September	1.3-1.8 x the minimum wage
October	1.0-1.5 x the minimum wage
November	1.0-1.5 x the minimum wage
December	Wait until January



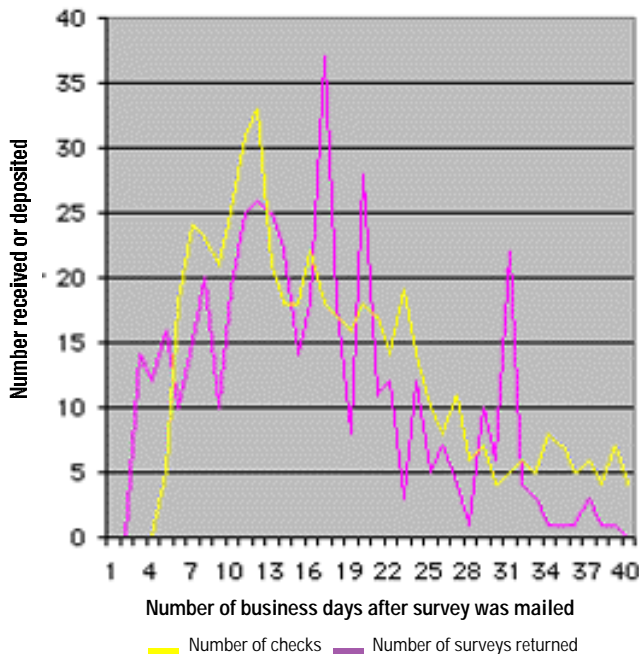
erates a 60% to 80% winter response rate at a 1.0 incentive rate. An increase to 1.5 times the minimum wage has no appreciable difference on the response rate.

Honor payments. There are two ways to pay panelists. The most common method is by sending them personally addressed checks upon return receipt of their panel booklet. Doing so ensures control over the checks, accountability, and accurate reporting. Unfortunately, there are extra administrative steps, and the response rate drops because the reward is so delayed.

An alternative is to include unaddressed checks when sending the panel booklets. We call these "honor payments." After predetermining the appropriate amount, have checks preprinted with that amount and signed with a stamped signature. It's important to indicate to consumers in the "check note" area (lower left hand corner of the check) that the check should be cashed only if the survey is completed. Similarly, the cover letter needs to emphasize that the check is being sent in a good faith effort and, if the consumer does not wish to complete the panel survey, he or she should simply tear up the check and throw it out with the survey.

Cynical researchers fear the response rate for the survey will be 35%, but the response rate for cashed checks will be 100%. This is not the case. Our tracking studies have shown a strong correspondence between those who fill out the survey and those who deposit the checks. Few people (2% to 3%) behave in the

Exhibit 1 Respondent return rate



greedy manner of the cynic. Along with a basic level of integrity, signing the check is a barrier to illicit depositing of checks. Follow-up interviews indicate a concern that the checks will be tracked and corresponded to returned surveys.

The amount of money that needs to be seeded into the account can be calculated by estimating the response rate and by adding a 20% cushion margin. As a way of managing the outflow of money, it's useful to realize that the incoming checks return at the basic rate illustrated in Exhibit 1. The return rate illustrated in Exhibit 1 is typical of most patterns of returns. It involved 1,000 panelists who were mailed an honor payment of \$6 to complete a questionnaire that examined their purchase rates and consumption rates of various hedonic and utilitarian foods.

Based on a number of studies, such as the one illustrated in Exhibit 1, we can make some basic generalizations about using honor payments. These can be useful in helping manage expectations (and cash flow) during first experiences with convenience panels and honor payments. In general, 20% of the panels will deposit their check before their survey is returned. Most checks will be deposited on Monday, a trend that becomes even more exaggerated past the third week after the study. Also, if the face value of the check is under \$5, 5% of those who complete the survey will not deposit the check. There is only 3% to 7% "fraud" (deposited checks with no completed survey), but it typically doesn't occur with small face value checks. Most of this is suspected to be unintentional.

Retaining Panelists

Panelists need some form of tangible compensation, but panelists get involved in a convenience panel partially because they believe their opinion is valued and can make a difference.

Reinforcing this feeling is important in helping retain panelists, and these guidelines will help. While these same efforts are important with convenience panelists, they're generally important for all types of panels.

Send "best wishes" mailings. One approach to keep panelists involved and favorably predisposed toward the panel is to send periodic "best wishes" mailings that thank them for their participation. Two mailings per year are sufficient. They should be sent during the holiday season and the summer. Because sending holiday cards can be expensive, an option is to send a brief newsletter, with a holiday greeting on the front and a recap of some of the past year's highlights, along with thanks for their help over the past year. This recap is best done in the context of a montage of press clippings related to projects from recent years, interspersed with photos of people from the lab or research organization. The card itself can be signed (a copied signature) by the primary contact person or can also include signatures of other relevant people in the lab.

Use only one panel director. Associates, graduate students, or rookies are sometimes used to maintain the panel and coordinate activities. This is often foolish. The glue that holds good panels together is a sense of commitment to an institution or to an individual. Many years of goodwill can be eroded by an arrogant or discontent associate, or by a careless or disorganized graduate student. It's too easy for a person to treat the panel like a transaction rather than as an asset. Like other relationships, panel relationships need to be nurtured and not taken for granted.

A convenience panel should have only one person as the figurehead and contact person. The ideal contact person and panel director is one who is vested in seeing the panel succeed and survive, is a good people person, and is thoughtful and patient. If the person works with assistants, the best assistants are friendly people who are demographically similar to the target population.

Offer to send copies of results. It's always advisable to offer to send consumers copies of the results. Offering to send the results sends an important signal that nothing illicit is happening with the data they provide, and it shows that the panel director is honest. In most cases, the panelists don't want the results, but they like knowing they're available.

If a panel survey includes a check box that says, "Please send me the results of the study," it's easy for the consumer to check the box (and approximately 60% will), but do they really want the results? If they're told to include a self-addressed envelope, the response rate drops to 3% to 5%. If they need to include a stamp on the envelope, response drops to 1% to 2%.

Minimize Costs

With convenience panels, responses are higher and costs are lower. Nevertheless, they're still expensive because of panelist incentives, administrative costs, and postage.

Incentive costs. One way to save on incentives for panelists is to provide a reduced monetary incentive and to supplement this with a lottery. If the mailing is going to be large, the incentive of winning a \$1,000 lottery can be effective. Sometimes, however, the per-person savings aren't as great as you'd think. If the mailing is going to a convenience panel of 1,000, a \$5 incentive might generate 600 people at a total incentive cost of \$3,000. If

a \$1 incentive is sent with a two chances to win \$1,000, the response is more likely to be 400 at a cost of \$2,400. Although using the lottery is a little less expensive—in total—the per-person cost of using a lottery is \$6 per person and the cost of not using one is \$5 per person.

Yet the per-person costs are only one issue when deciding between lotteries and cash payments. Even if the lottery would be less expensive (per person) than a cash decision, reconsider using a lottery if (1) it decreases a person's long-term commitment to the panel, (2) it biases the type of person who will respond, or (3) it makes a person less careful in completing the survey.

If more than one of the answers is feared to be yes, it might be better to not use the lottery. Alternatively, one compromise can be to increase the amount paid and decrease the amount of the lottery. Instead of paying \$5 vs. \$1 plus two chances to win \$1,000, a compromised package of \$2.50 and one chance to win \$1,000 may eliminate some unintended effects of using a lottery.

Administrative costs. It's easy to believe that envelope labeling and stuffing can be done more cheaply in house, but this may be a mistake. Mailing centers can often stuff envelopes for 3 cents an item and can quickly address the envelopes. For mailings under 200, the speed and convenience of doing this in house can overcompensate for what the mailing center would charge. However, when the mailing gets any larger, the opportunity costs for the postage and handling can become excessive. An important way of saving on both administrative and mailing costs is to use the "honor payment" system outlined earlier. This method saves money on check handling and postage.

Mailing costs. Companies can save on mailing and handling costs by mailing through a nonprofit status when possible and through bulk mail when not. For a 16-page survey, the nonprofit status mailing can save 70% over that of a first class mailing. For a bulk mailing status, the savings can be around 40%. Whether

to use business reply return envelopes or to pre-stamp return envelopes depends largely on the expected response rate. Unless the mailing is very small in number, or very urgent, or unless you expect a very high response rate (70%+), it's generally more cost-effective to use business reply envelopes.

Convenience panels make sense when you're not trying to project to a general population. They're particularly well-suited for measurement tests and experimental designs and for pre-screening people for focus groups and central facility experiments. While developing and managing these panels is similar to that of larger panels, our experience has shown a greater need for personalization and "hand-holding" in both the recruitment and retention of the panels. Yet a well-screened, well-trained panel can be useful in providing quality data, feedback, and insights. They also facilitate troubleshooting of problem areas, more effective idea generation, and less noisy experimental results.

When generalizability is not an objective, there are times when the speed, cost-savings, and follow-up ability of a convenience panel overshadow the importance of its representativeness. For academics, it provides an easy solution for generalizing beyond an overused 19-year-old sophomore subject pool. ●

Authors' Note: This article is based on insights gathered during the authors' writing of *Consumer Panels* (American Marketing Association, 2002). For more information on consumer panels, visit www.consumerpsychology.net.

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