

Equitable Communication Strategies During Panel Recruitment:

Impact on Recruitment and Data Quality

CIPHER Conference

February 28, 2025

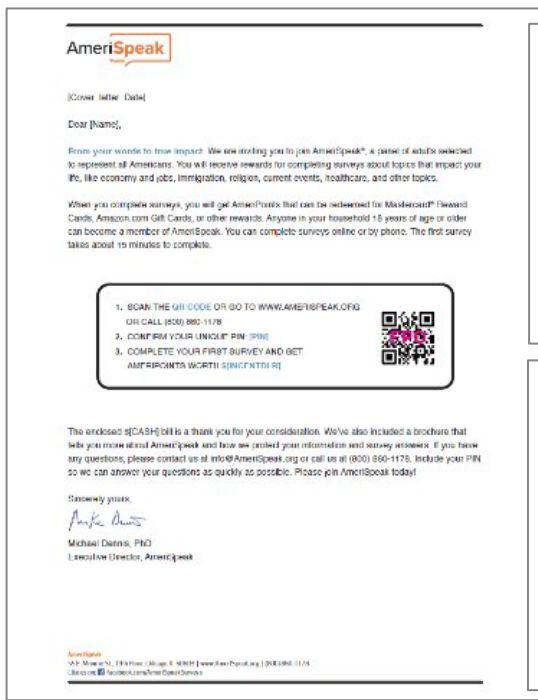
Ipek Bilgen, Solvejg Wastvedt, and Robert Ashmead



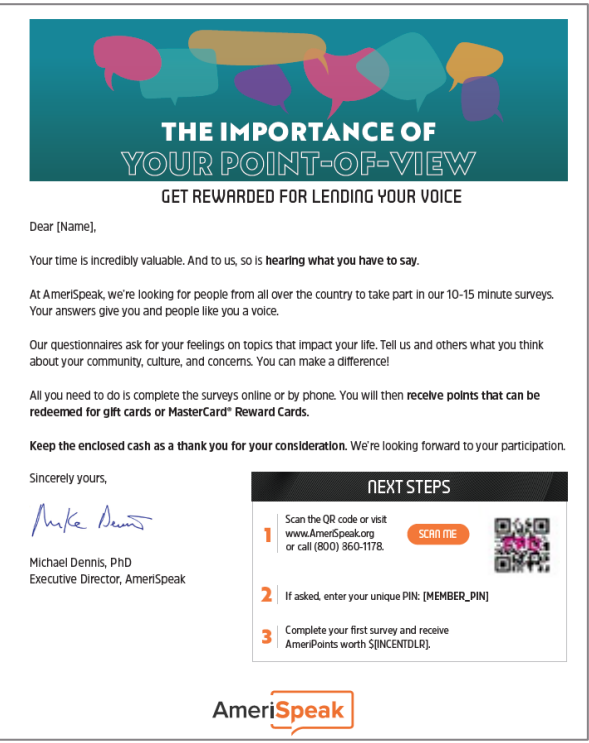
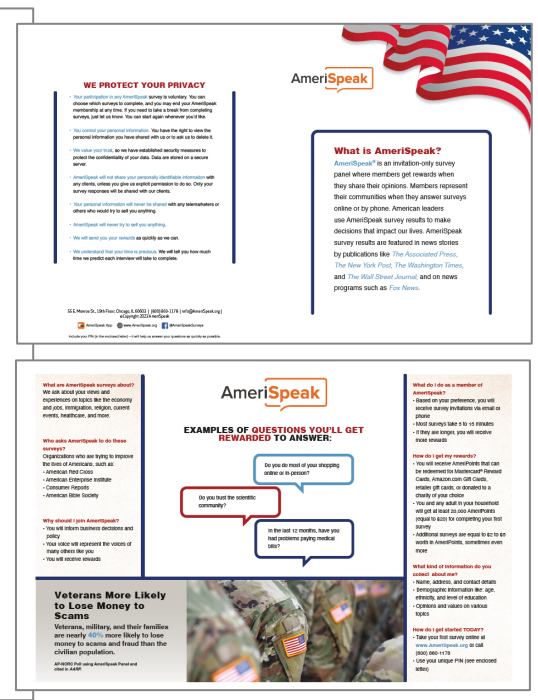
- **There is a lot of variation in terms of how probability panels recruit panelists**
 - Sample frame, recruitment protocol, which contact and data collection modes they use, incentive amount, etc.
- **One common recruitment related issue is recruiting (and retaining) reluctant/hard to reach/underrepresented segments of the population**
 - Such as conservative, low education, low income, younger segments of the population, as well as minorities (such as AANHPI, Spanish-Speaker, Hispanic, AA/Black), etc.
- **In this study we examined strategies aiming to create more accessible/equitable mail contact materials for sampled households during recruitment to a probability-based panel**
 - **Our Goal:** Increasing overall recruitment rate, bringing in harder to recruit/retained panelists while monitoring data quality

- Simplification of the content in the contact mailings (providing a tagline)
 - Aim to appeal to those who do not have the ability, time, or willingness to read through long (and complex) contact materials
 - e.g., lower education, lower income, as well as higher income and those w/ children in their households

Letter



Brochure



• Inclusion of QR codes

- During mail push to web respondents need to type in the web survey URL and PIN provided on the mailed invite
 - The switch between contact and data collection modes is burdensome
 - May potentially turn off some of the sampled HH members/decrease RRs
- Solution? Use of quick response (QR) codes in everyday life has increased noticeably during the COVID-19 pandemic
 - QR code provides an easier way to access the web survey for those with smartphones
 - Which then decreases perceived costs of survey participation
 - Maybe more appealing to those who primarily use their smartphones for web access
- Aim to appeal to those who primarily rely on their smartphone for web access (*e.g., lower income and education segments*)

1. SCAN THE QR CODE OR VISIT WWW.AMERISPEAK.ORG
OR CALL (800) 860-1178
2. ENTER YOUR UNIQUE PIN: [PIN]
3. COMPLETE YOUR FIRST SURVEY AND GET AMERIPOINTS
WORTH \$[TOTALDLR]



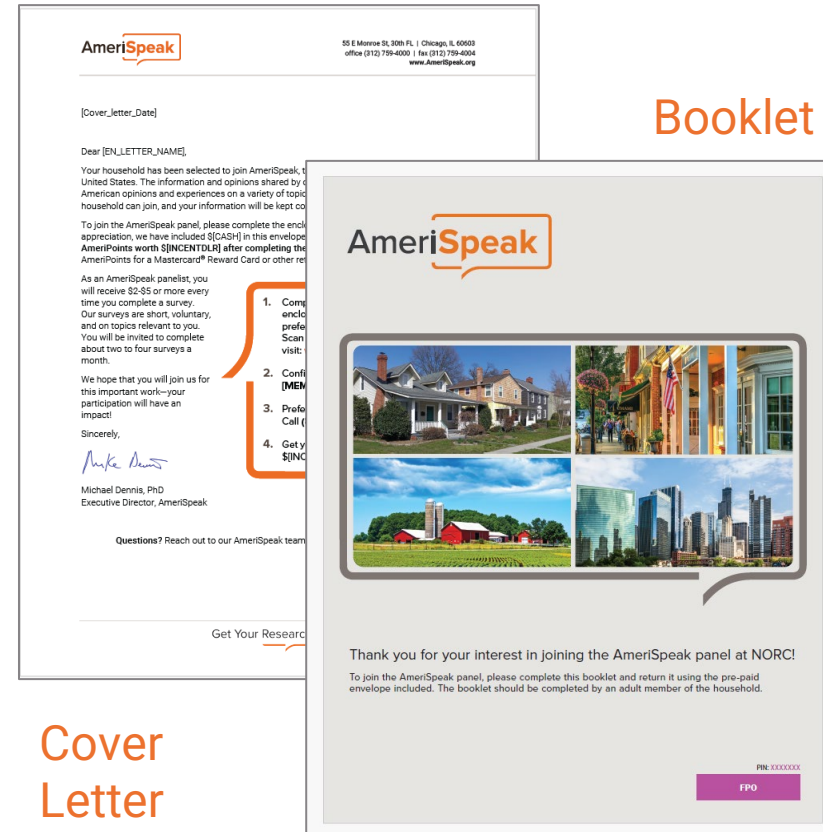
- Addition of PAPI contact mode

- Aim to appeal to those who are not regular internet users and/or reluctant to provide personal information online

- *e.g., rural and more conservative*

- Additionally, serves as a reminder contact

- Gives the ability to view the questionnaire without additional effort, which potentially informs panelists about the request



Study objective: To improve both **overall** and **hard to recruit/hard to retain panelist** recruitment yield by experimenting with different interventions during contact for panel recruitment while not increasing measurement error

Research Questions:

- During panel recruitment, how does the use of equitable strategies during the initial mail contact stage collectively and individually impact:
 - overall recruitment rate
 - % of hard-to-reach panelists
 - Specifically, segments of the population who are harder to recruit and not always well covered in panel studies
 - Measurement error/data quality
 - Relationship between nonresponse and measurement

Data & Methods

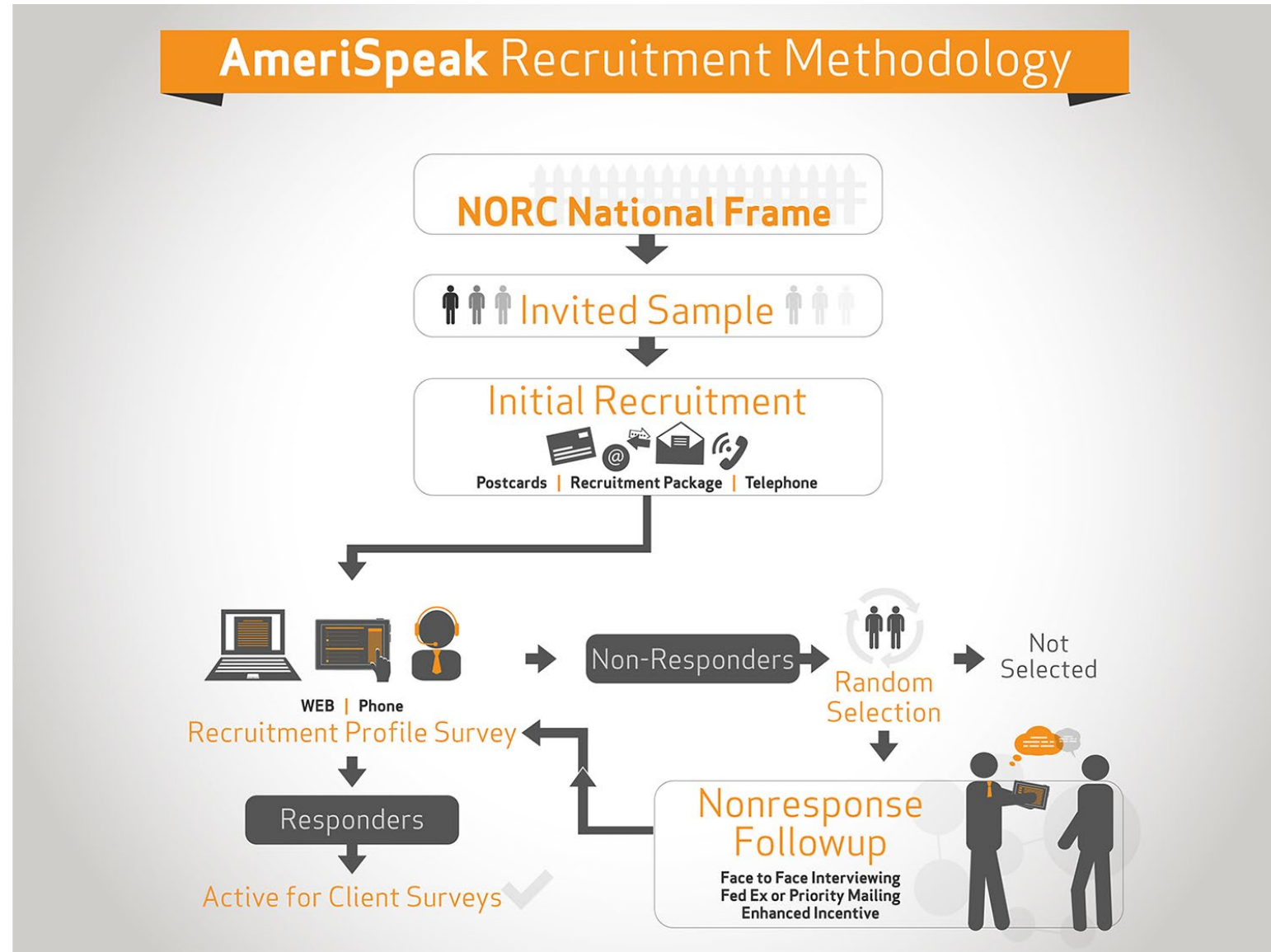


Initial Recruitment

- Pre-notification postcard
- +5 days, 9 x 12 recruitment packet w/ pre-incentive, study brochure and privacy policy
- +12 days, reminder postcard
- Call-ins allowed throughout
- **(NEW IN 2024)** +25 days, PAPI follow-up
- Call-outs to matched telephones

NRFU Recruitment

- Federal Express study brochure and enhanced pre-incentive
- In-person recruitment



During 2024 Panel Recruitment:

Randomized experiments in sequential mailing replicates (3x2x2)

1) Simplification of contact mailings:

Original design (control) vs. Simplified new design

- **Original Design Experiments:** Brochure (control) vs. No brochure
- The simplified new design mailings did not include a brochure

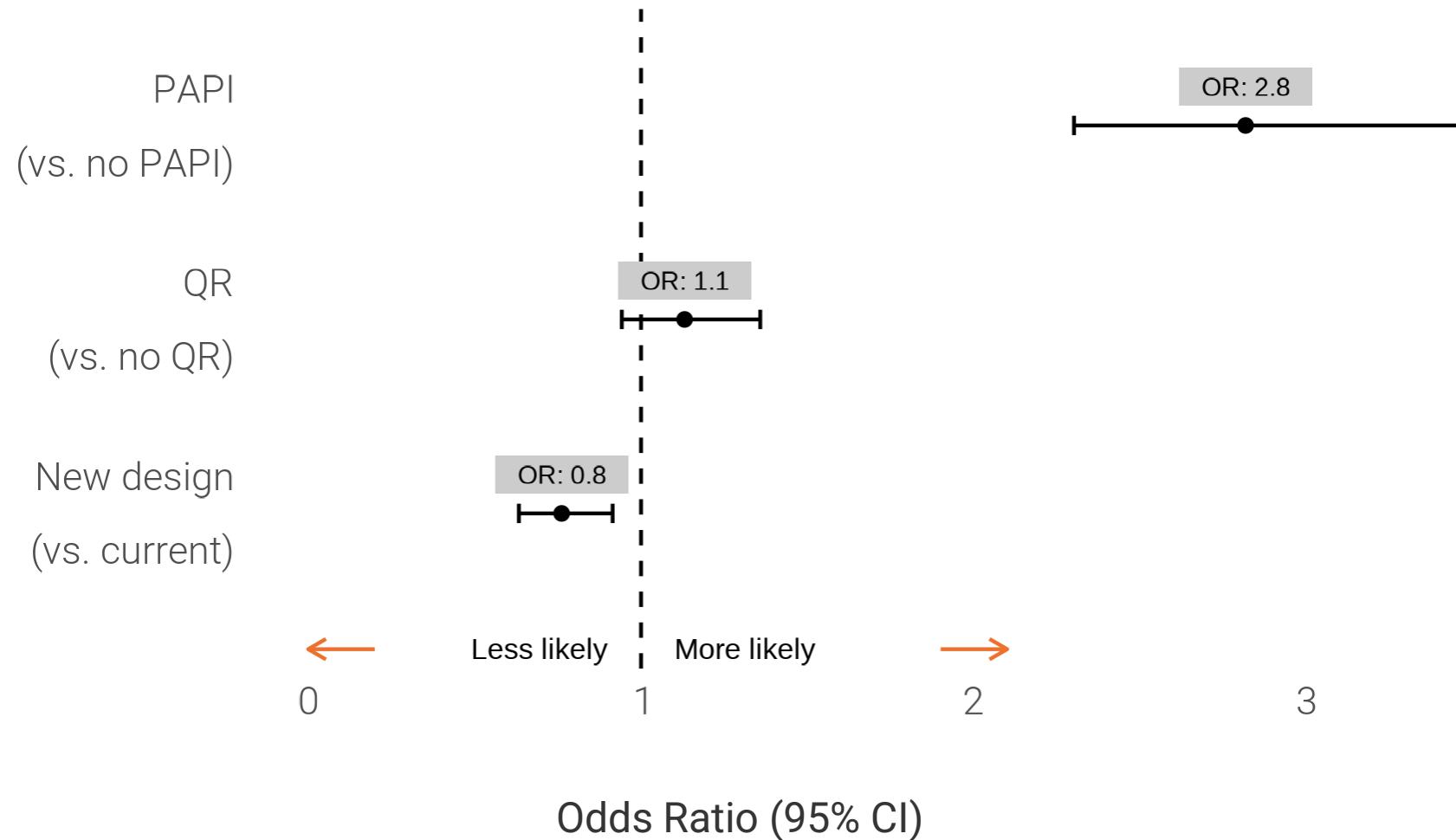
2) Easier way to access the web survey: No QR code (control) vs. QR code

3) Addition of a new mode: No PAPI (control) vs. PAPI

Results

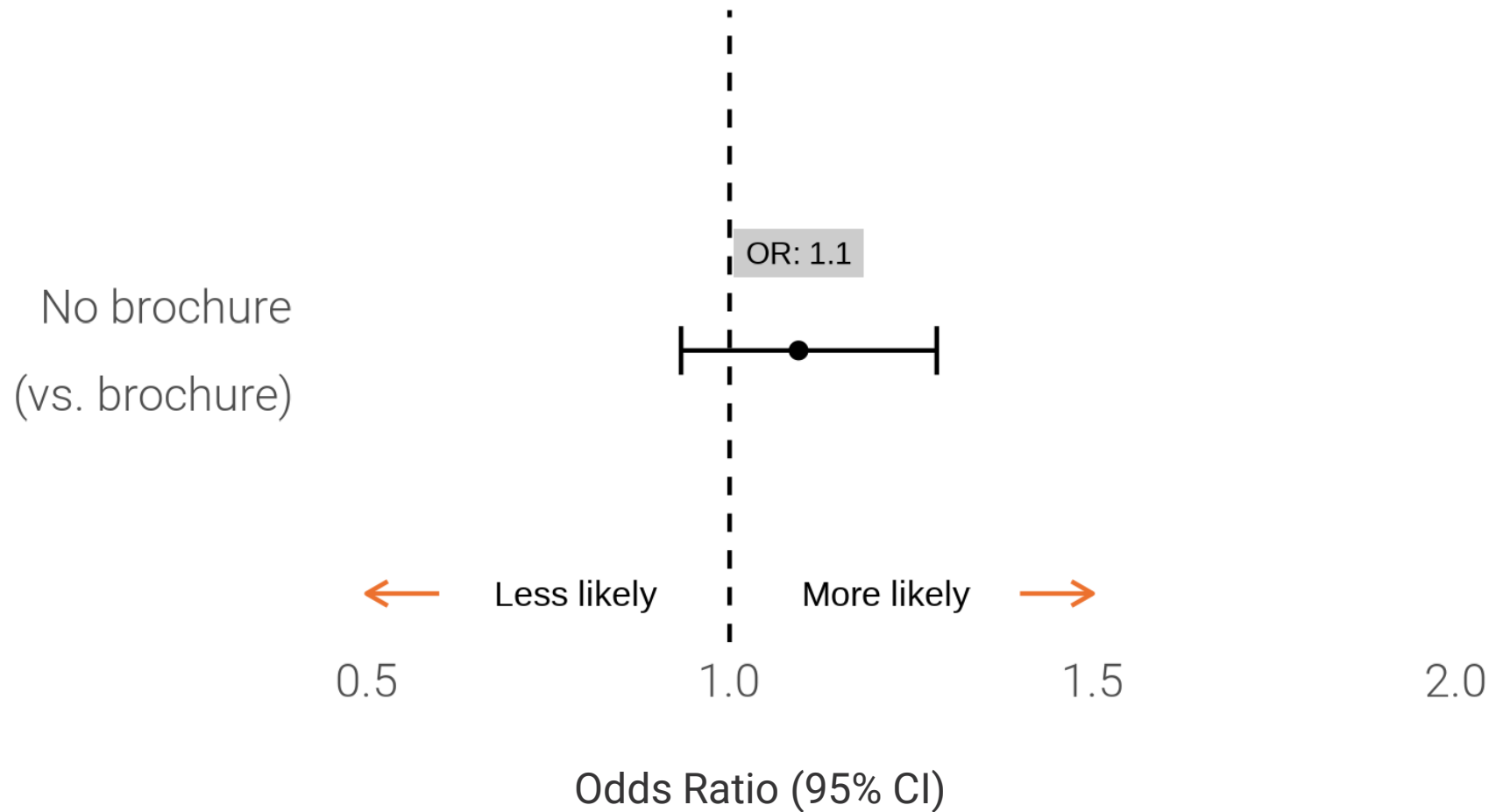


Likelihood of being recruited during the initial mailing stage



A recruitment mailing sequence using PAPI is 2.8 times more likely to convert a sample household member to a panelist at the initial mailing stage

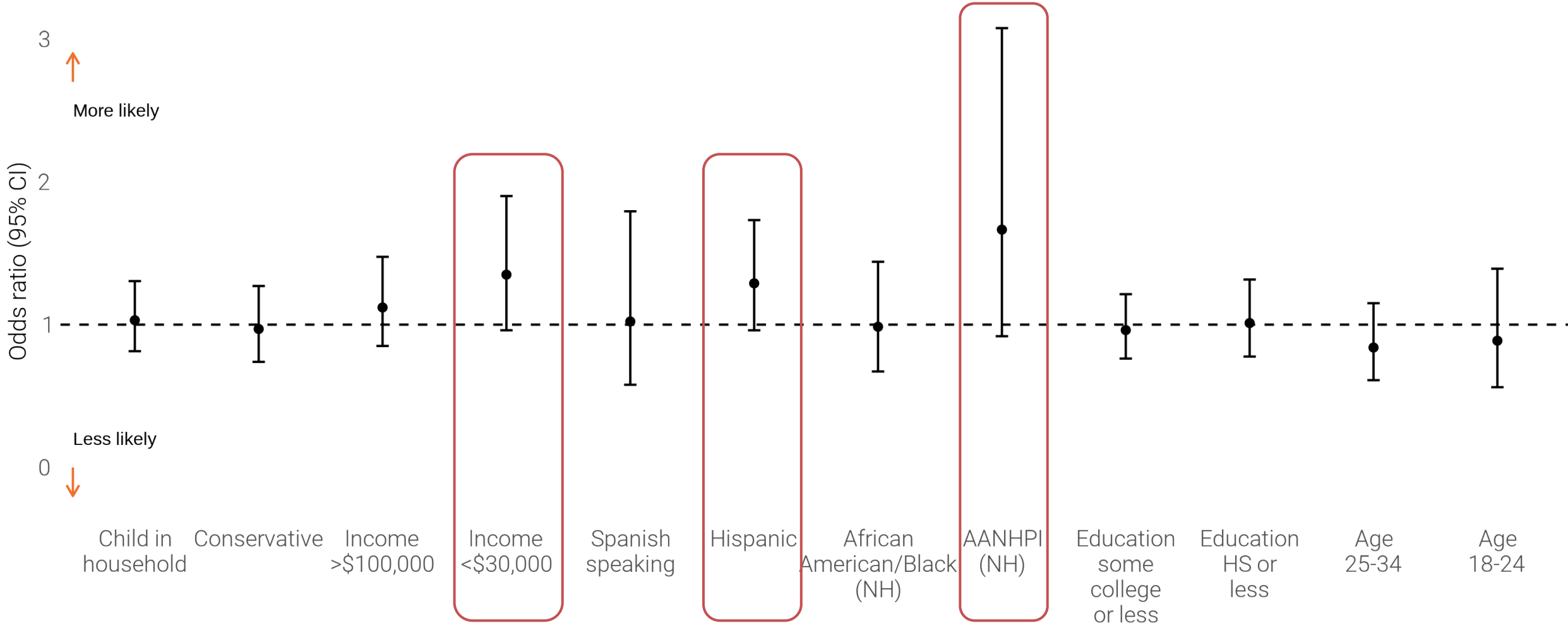
Likelihood of being recruited during the initial mailing stage



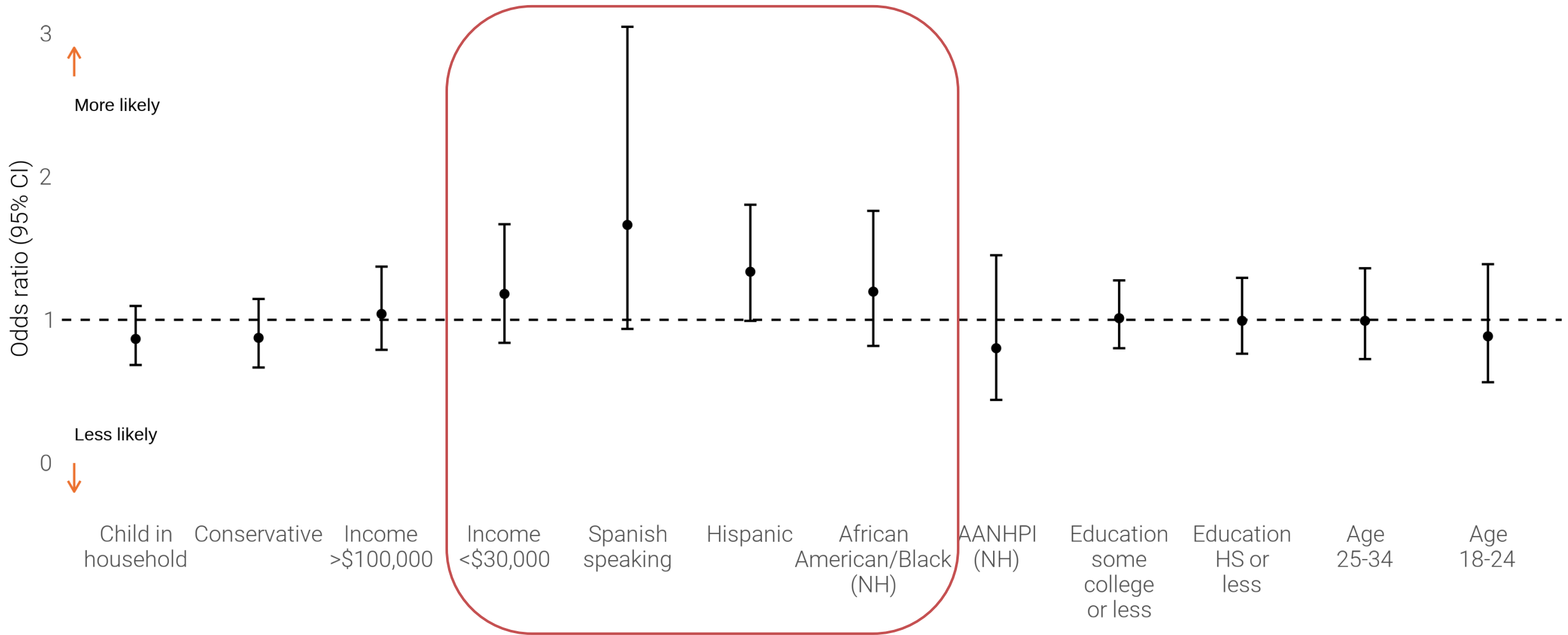
Exclusion of the brochure from the mailings slightly increased the likelihood to convert a sample household member to a panelist at the initial mailing stage

* Model includes only observations assigned to current design. All new design mailings excluded the brochure.

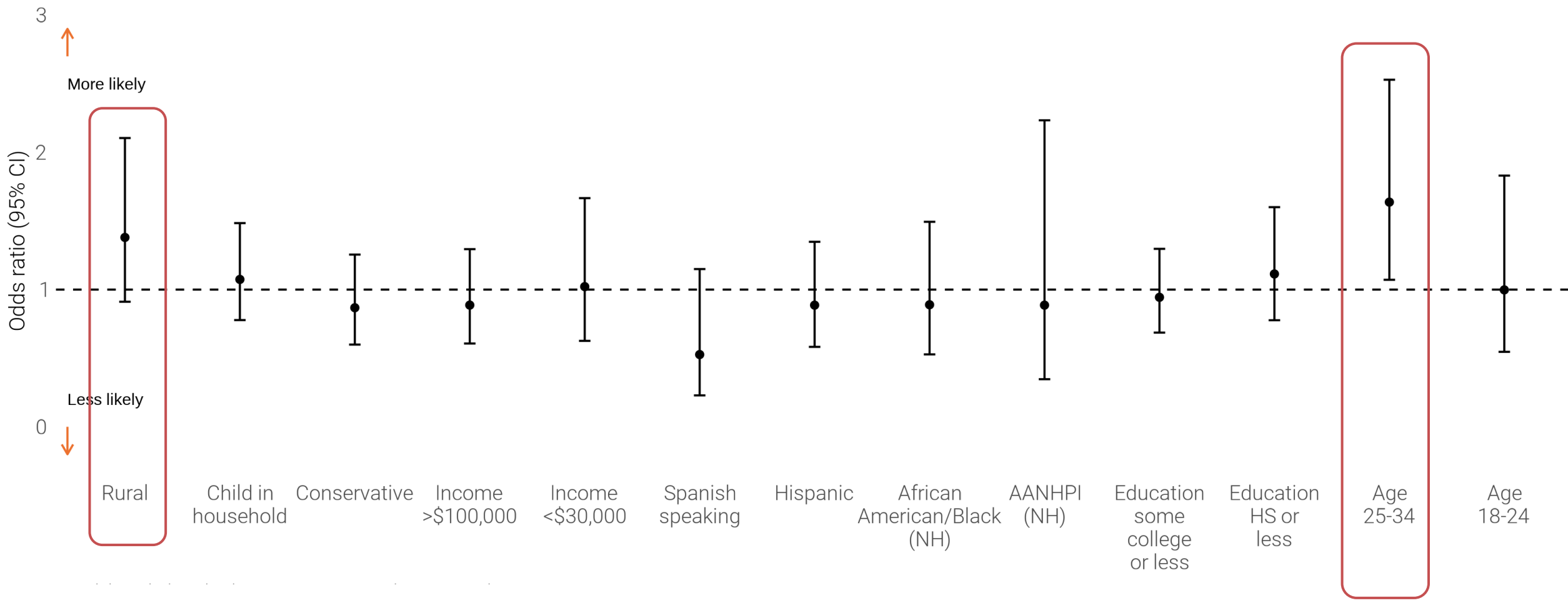
Effect of new design on demographics of initial recruits



Effect of QR on demographics of initial recruits

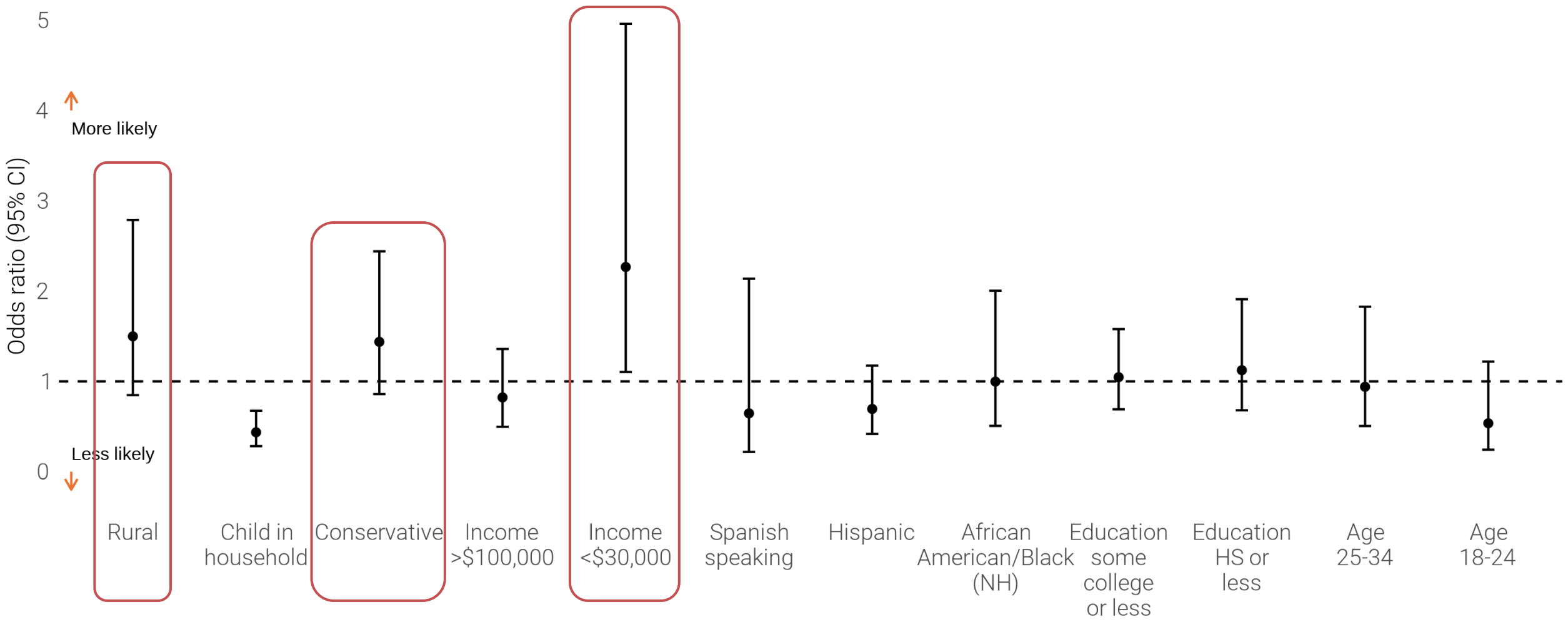


Effect of no brochure on demographics of initial recruits



* Model includes only observations assigned to the current design.

Effect of PAPI on demographics of initial recruits



*AANHPI (NH) group not modeled due to insufficient sample size.

Data quality measures were not significantly different across treatment groups*

Measure	Experiment Group	Mean	ABS (Diff)	p-value
Completion time (seconds)	Old design (control)	969	24 seconds	.557
	New design	945		
	Brochure (control)	953	7 seconds	.885
	No brochure	960		
	w/out QR code (control)	961	6 seconds	.886
	w/ QR code	955		
Item nonresponse	Old design (control)	.012	0.002	.450
	New design	.014		
	Brochure (control)	.013	0.001	.716
	No brochure	.012		
	w/out QR code (control)	.010	0.004	.216
	w/ QR code	.014		

* Average straightlining was less than 1% per experiment group. This measure is not included in the table due to the low occurrence rate.

- **Our findings lean towards recommendation of using equitable contact strategies**
 - The addition of QR codes and exclusion of brochure slightly increased the initial recruitment rate
 - The addition of PAPI significantly increased the initial recruitment rate
 - Cost savings during the NRFU stage (which uses more expensive modes such as F2F)
 - Different equitable design strategies brought in different segments of the population who are harder to recruit and not always well covered in studies
 - Such as low income, minority, rural, and conservative
 - Potential for differential tailored design using auxiliary data
 - Did not impact data quality (did not increase satisficing behavior)
- **Though, more data is needed to examine interactive effects of three strategies on yield, respondent composition, and data quality**
 - We will continue most of these experiments in 2025
 - We are also examining additional contact modes such as texting in 2025

Questions?



Thank you.

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Get Your Research Right



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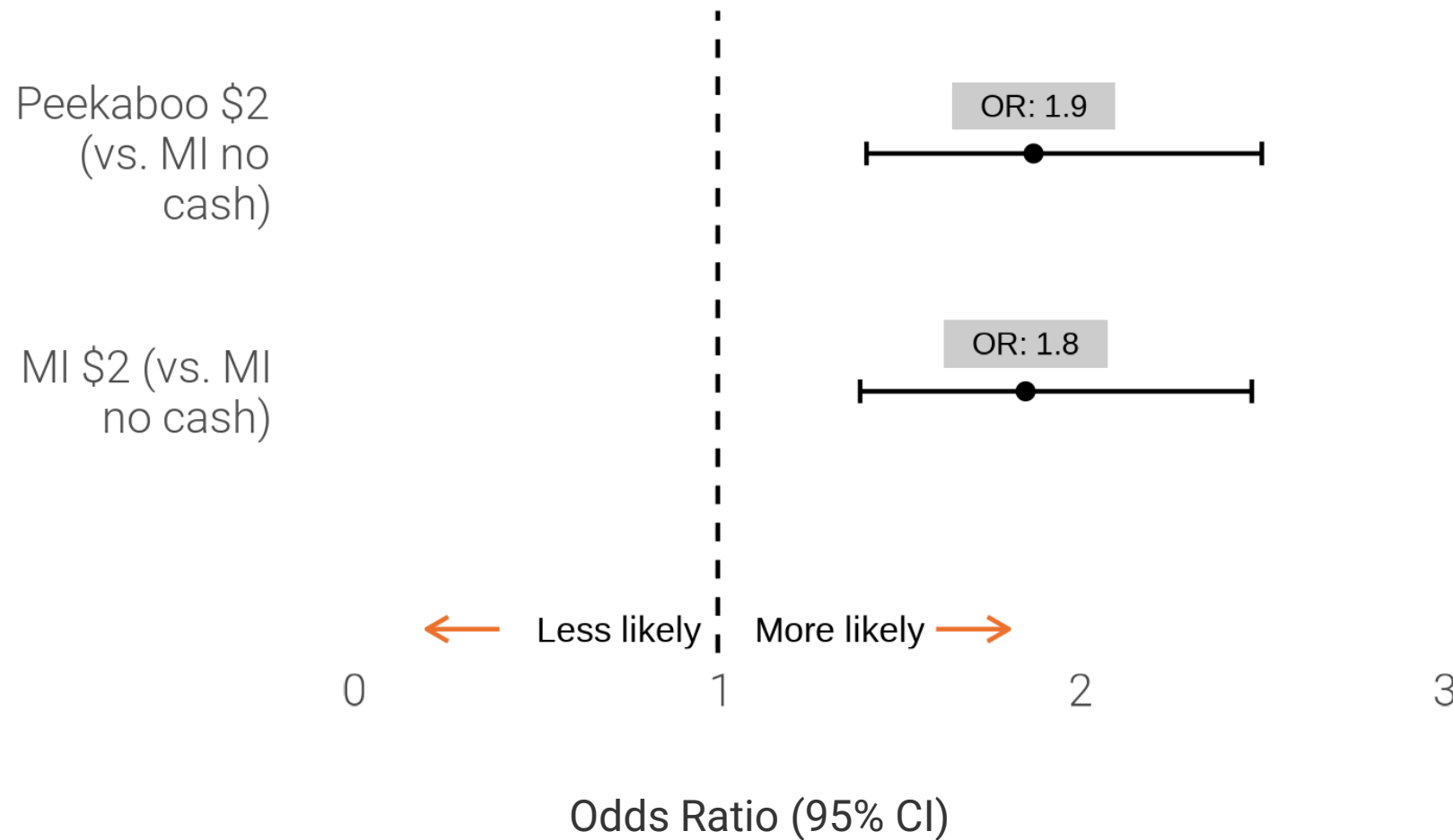
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PAPI Experiments:

- No cash incentive & UPS Mail Innovations
- \$2 cash incentive & UPS Mail Innovations
- \$2 cash incentive & First class (presort stamp), w/ peekaboo

Likelihood of being recruited during the initial mailing stage



PAPI mailing w/ \$2 sent via UPS Mail Innovations is 1.9 times more likely to convert a sample household member to a panelist than the no cash UPS Mail Innovations group

* Model includes only observations assigned to the PAPI group.