

Incorporating Text Messaging into Probability-Based Panel Recruitment:

Experimental Insights on Response and Retention

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Texting is now becoming a key contact mode in mixed-mode surveys

- Research from cross-sectional studies show that introducing unconsented text as a new reminder mode:
 - Improve response over another reminder in the same mode
 - Costs less
 - Bring those who primarily rely on their smartphone for web access (*e.g., lower income and education segments*)
 - Responses are generally fast
- During 2025 AmeriSpeak recruitment, we examined the addition of texting during recruitment:
 - **Our Goal:** Increasing overall recruitment rate, bringing in harder to recruit/retained panelists while monitoring data quality and attrition

Decrease nonresponse bias



Cost savings



Speed of data collection



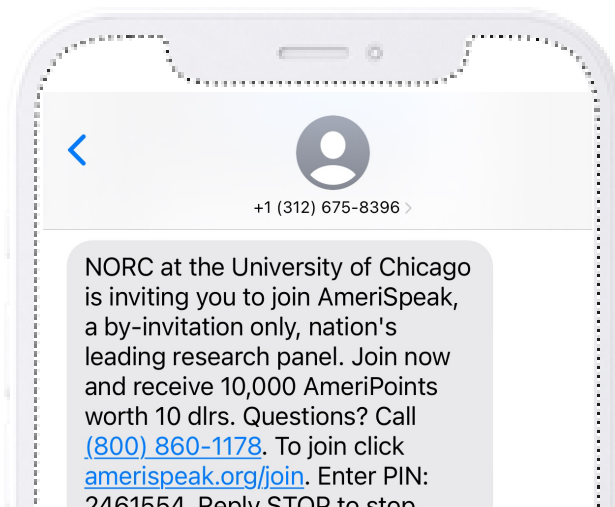
Research Questions:

- During panel recruitment, how does the use of unconsented texting during the initial mail contact stage impact:
 - overall recruitment and retention rates
 - % of hard-to-reach panelists
 - Specifically, segments of the population who are harder to recruit and not always well covered in panel studies
- When should texting be introduced during panel recruitment?
- How should we design texts (use of SMS versus MMS)?

MMS offers expanded capabilities than SMS and can be more effective

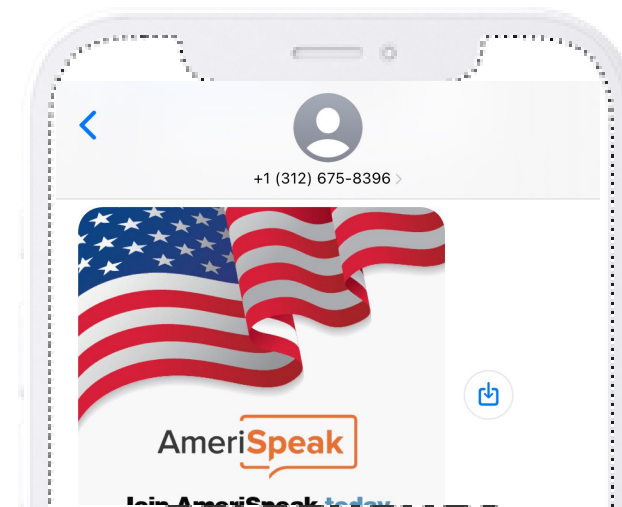
SMS (Simple Message Service)

- Short messages, 160-character limit
- Limited to alphanumeric characters
- All cell phones can receive; does not require data connection/internet access



MMS (Multimedia Messaging Service)

- Longer, formatted messages, 1600-character limit
- Allows for pictures, video and audio
- Requires data connection/internet access



Legal Landscape

- **Telephone Consumer Protection Act (TCPA) - “auto dialed” calls/texts are not permitted to mobile phones without consent**
- **Peer-to-peer (P2P) texting is permitted without consent**
- Consented texting has been common in surveys, especially for panel and longitudinal surveys

Technological Considerations

- Cell phone carriers can flag texts as spam or even block numbers detected to be sending mass texts
- Various technology platforms are available to facilitate sending texts at a large scale
- Platform choice is often determined by the type of texting and whether consented or not

Data & Methods

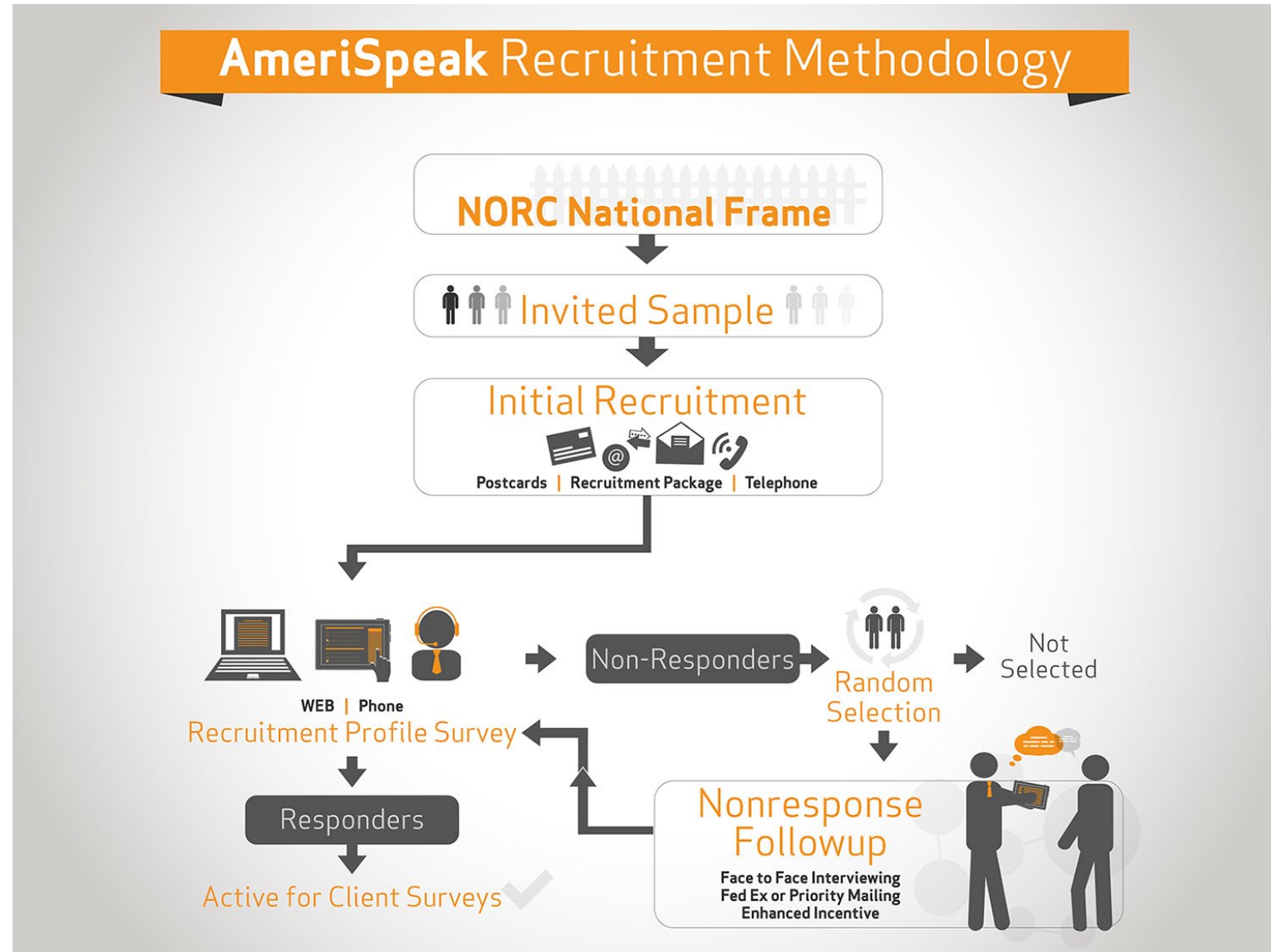


Initial Recruitment

- Pre-notification postcard
- +5 days, 9 x 12 recruitment packet w/ pre-incentive, study brochure and privacy policy
- **(NEW IN 2025) Text Experiment**
- +12 days, reminder postcard
- Call-ins allowed throughout
- Call-outs to matched telephones

NRFU Recruitment

- Advanced Pre-notification postcard
- In-person recruitment
 - Enhanced incentives



During 2025 Panel Recruitment:

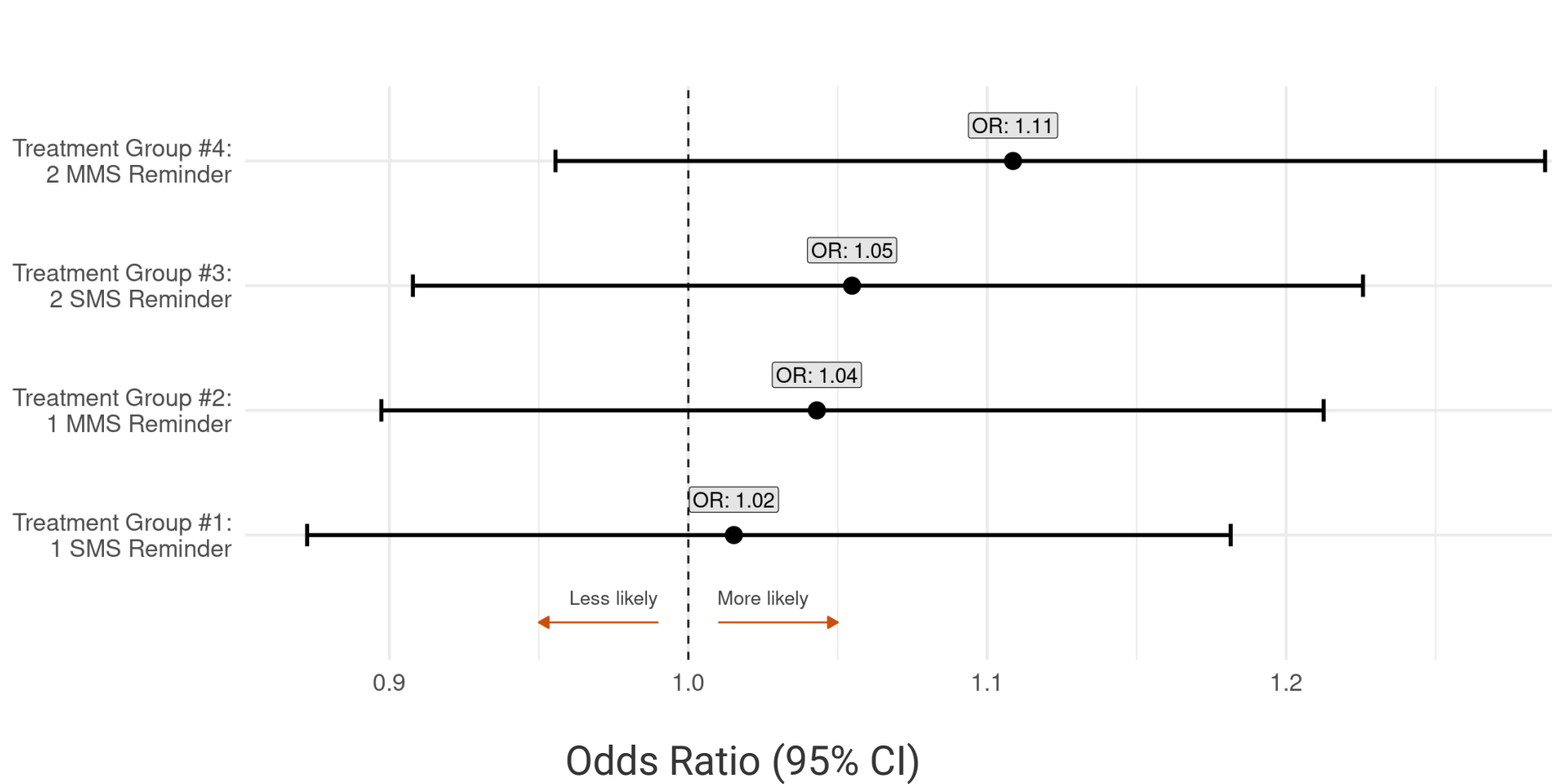
Experimented w/ adding text as a new contact mode

- **Control: No Text**
- **Treatment Group #1: 1 SMS Reminder** (sent after the initial packet)
- **Treatment Group #2: 1 MMS Reminder** (sent after the initial packet)
- **Treatment Group #3: 2 SMS Reminders**
 - First SMS Reminder is sent after the initial packet
 - Second SMS Reminder is sent prior to the outbound calls (at the end of the mailings)
- **Treatment Group #4: 2 MMS Reminders**
 - First MMS Reminder is sent after the initial packet
 - Second MMS Reminder is sent prior to the outbound calls (at the end of the mailings)

Results

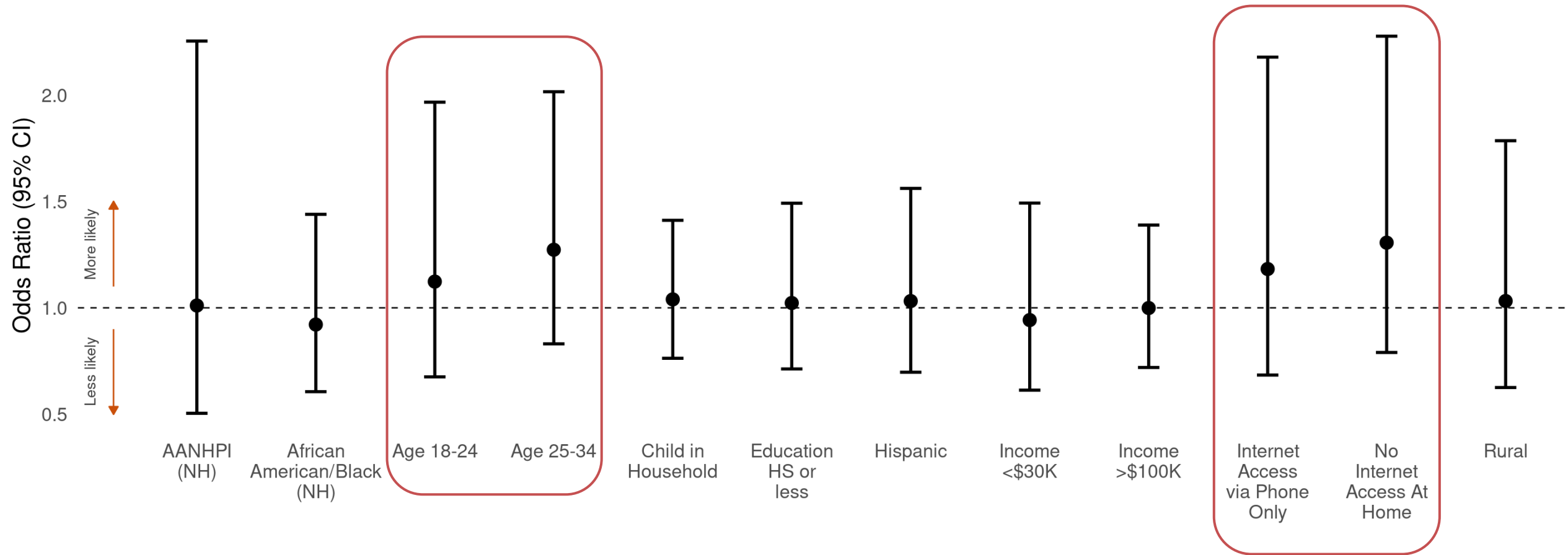


Likelihood of being recruited (by number and type of reminder text)

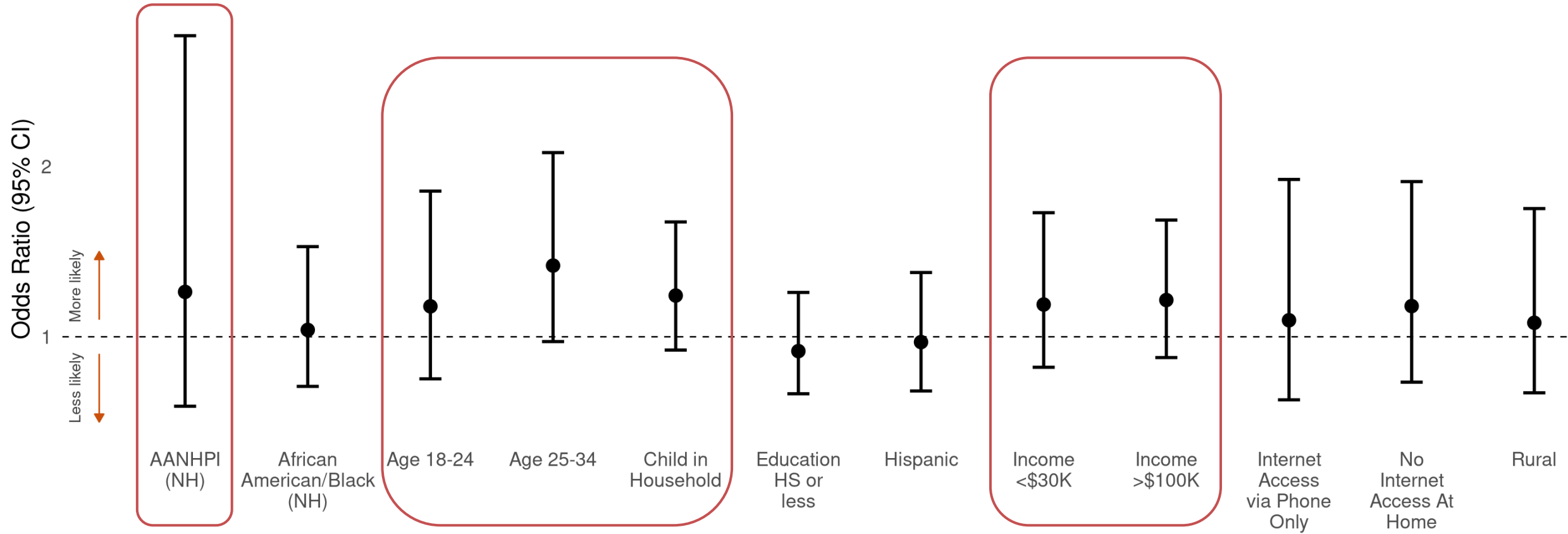


Additional 2 MMS text reminders are 1.1 times more likely to convert a sample household member to a panelist

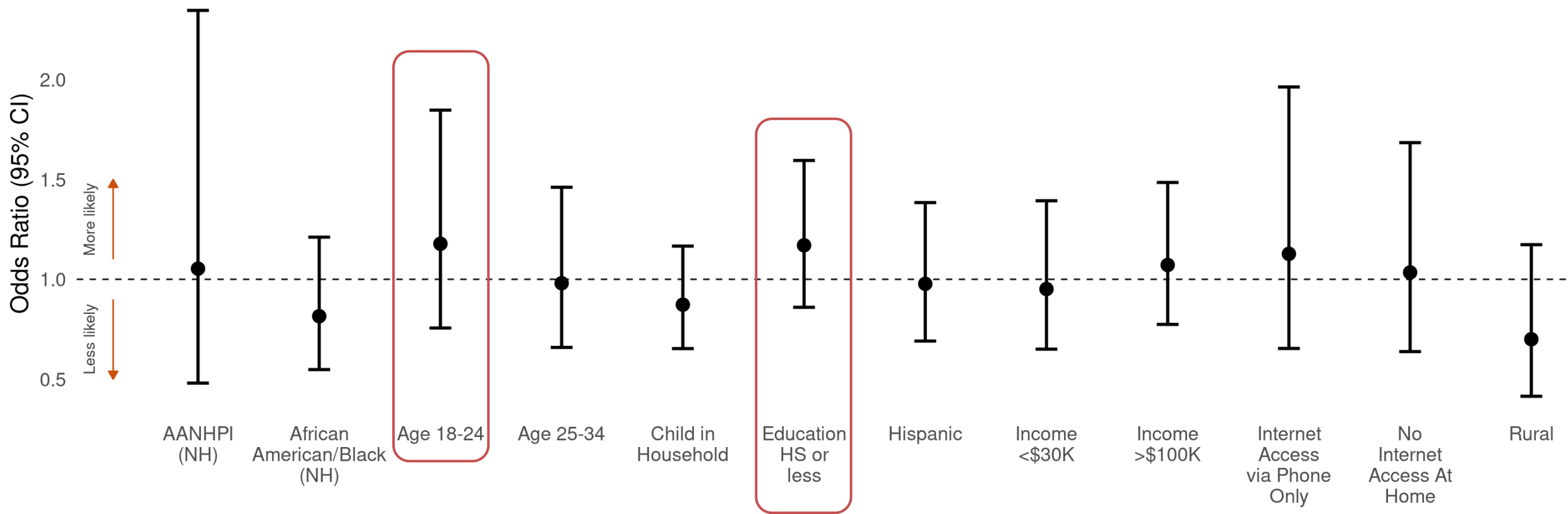
Effect of reminder texts during recruitment on H2R recruits



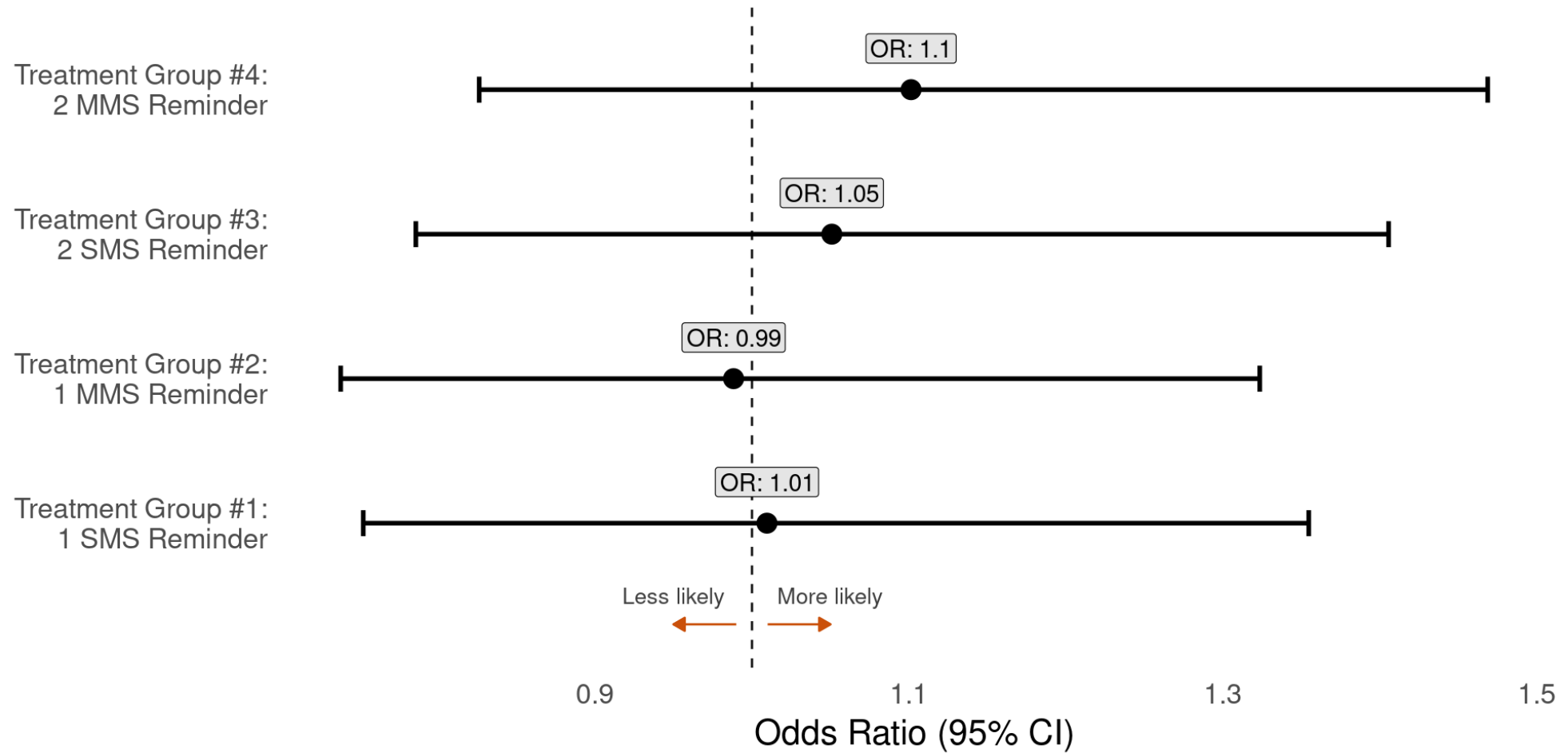
Effect of sending 2 SMS reminder during recruitment on H2R recruits

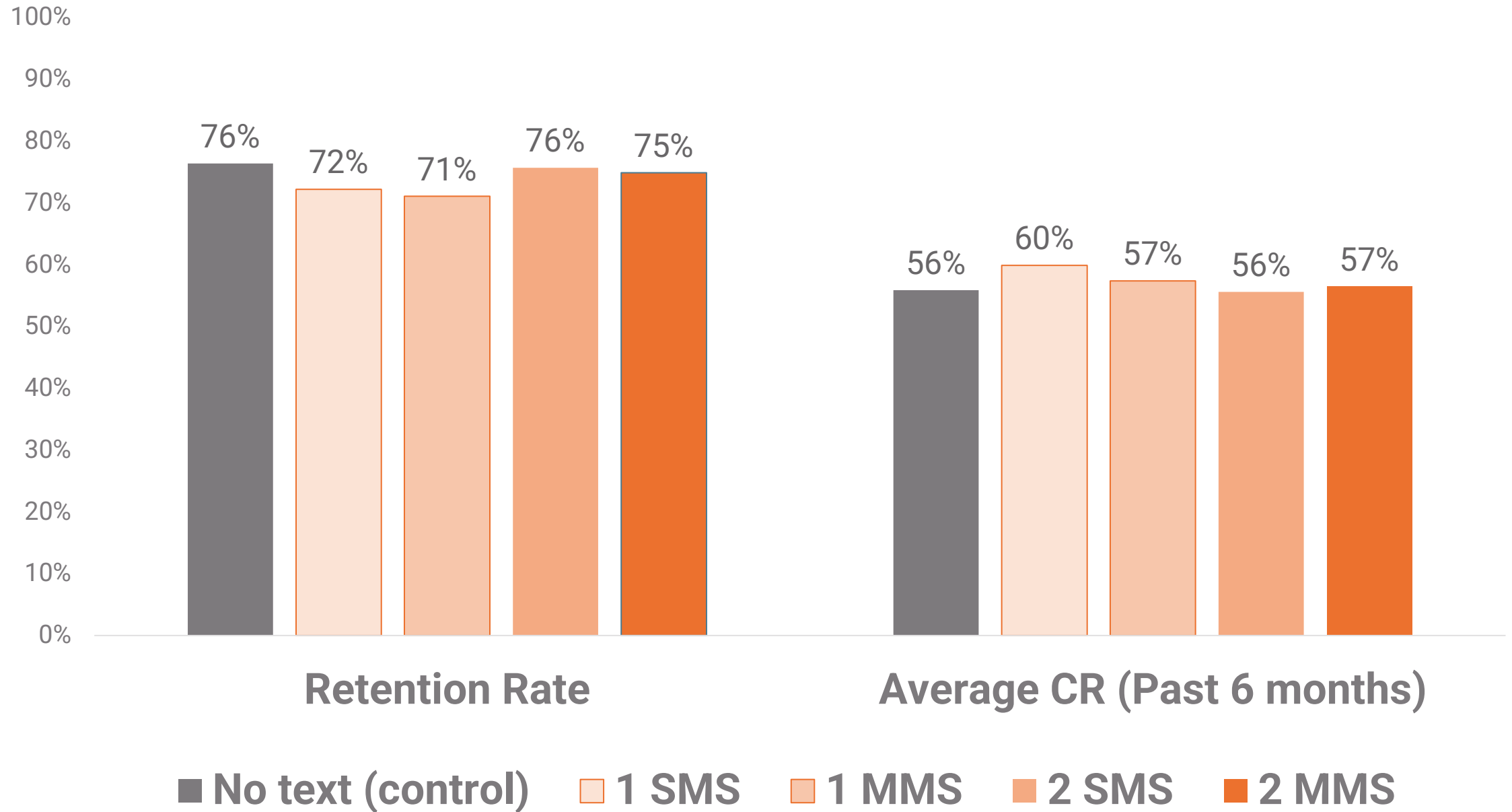


Effect of sending 2 MMS reminder during recruitment on H2R recruits



Likelihood of completing the recruitment survey via smartphone





- **Our findings lean toward recommending the addition of unconsented text reminders during panel recruitment**
 - Improves recruitment
 - 2 MMS > 2 SMS > 1 MMS > 1 SMS > No text (Control)
 - Brings in panelists who primarily use smartphones for survey participation
 - No composition differences between text groups vs. no text (control) group
 - No negative effects on retention or completion rates
- **Though, more data / further experiments are needed**
 - Optimal number of reminder texts (2 vs. 3 vs. 4)
 - Alternating between MMS and SMS reminders
 - Texting shows promise for operational cost savings
 - Experiment w/ replacing additional reminder mailings

Questions?



Thank you.

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