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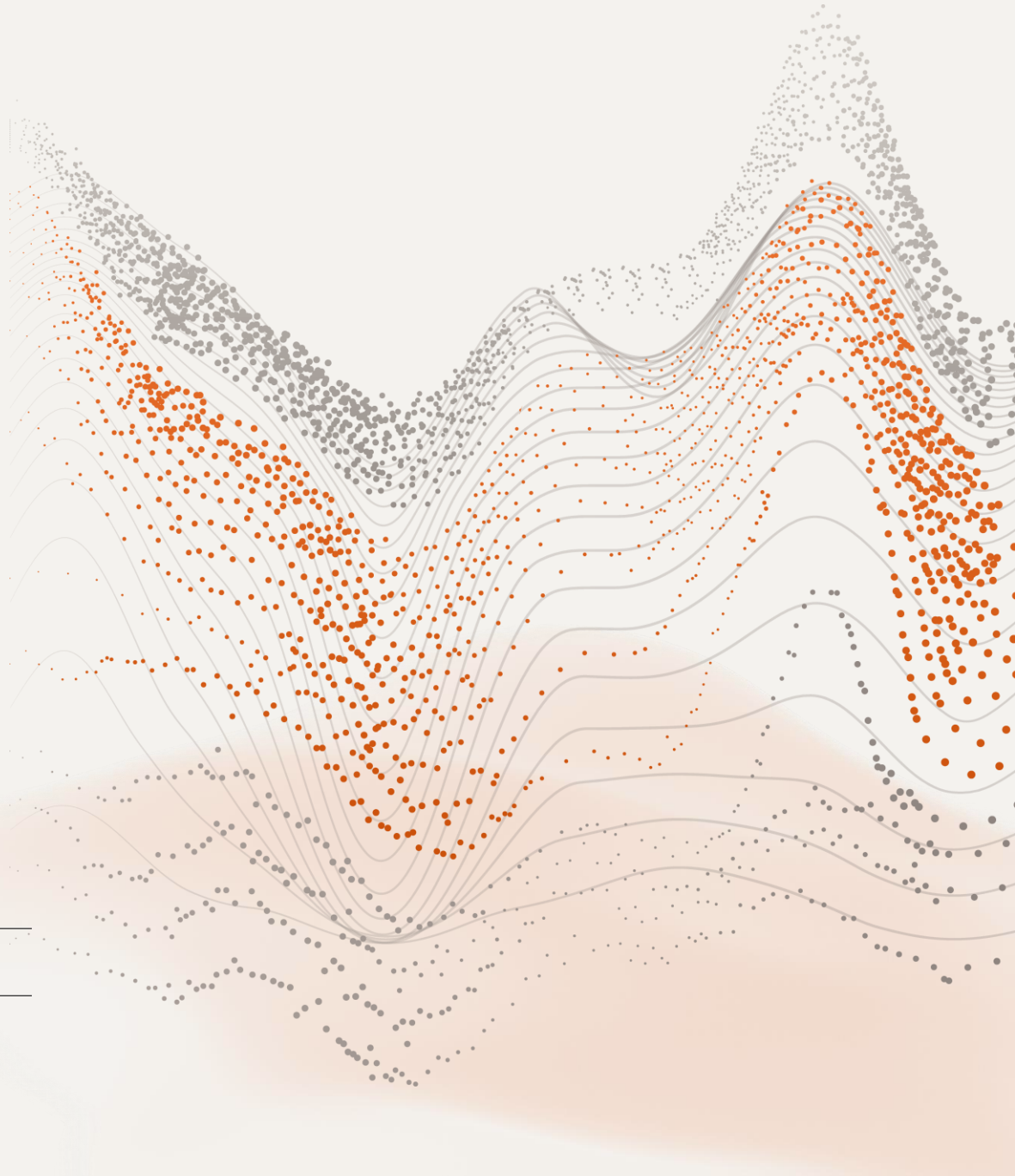

Texting and Mixed-Mode Surveys

National Academies:
A Workshop on Future Directions for Social and Behavioral Science Methodologies in the Next Decade

September 26, 2024

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Senior Vice President, Methodology & Quantitative Social Sciences

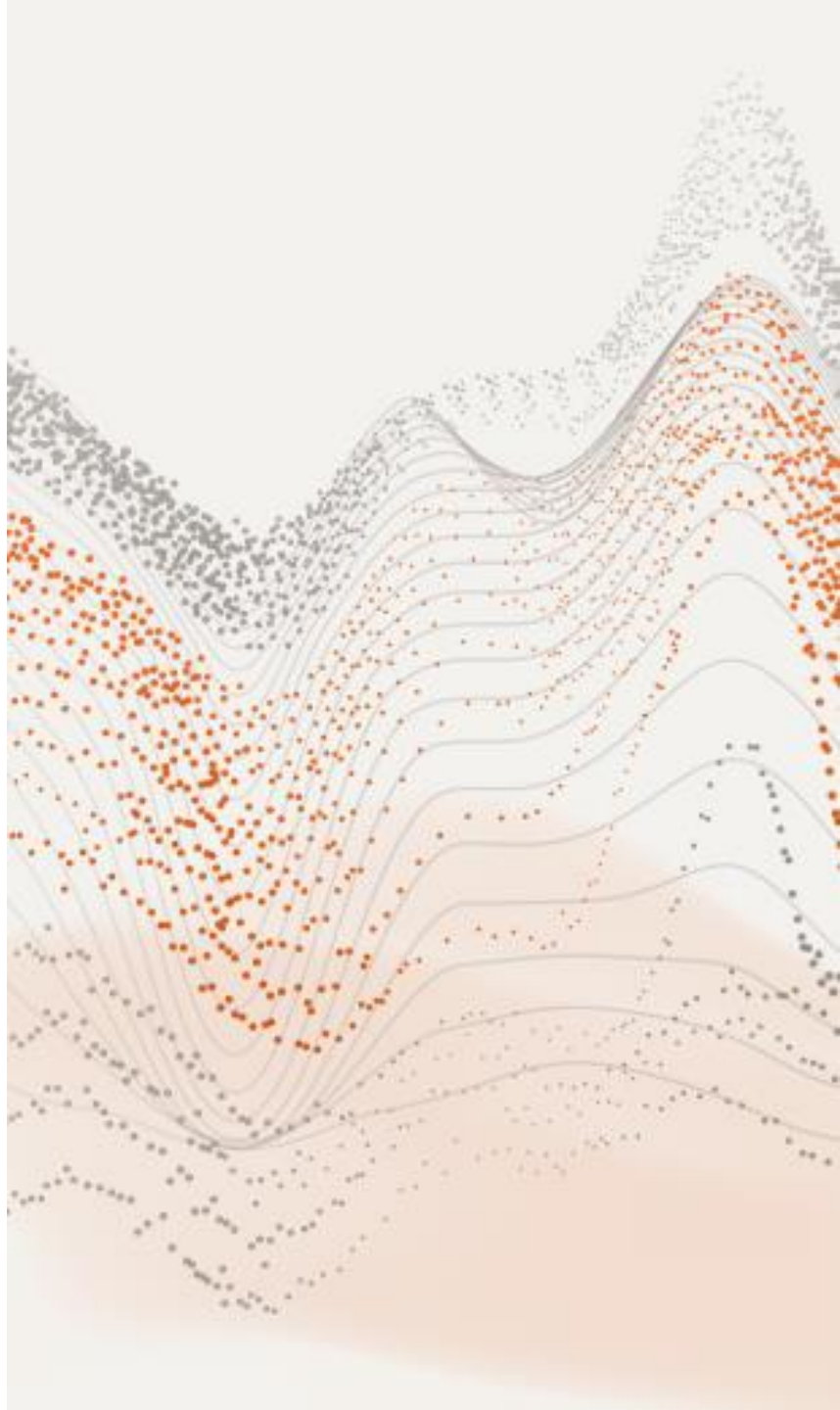
Agenda

01 Texting in surveys

02 Recent research on texting

03 Texting best practices

04 Future directions



Texting in Surveys

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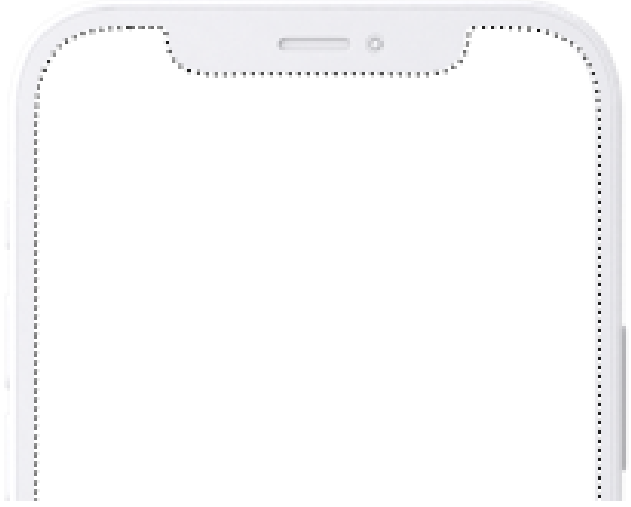
Texting is the activity of creating and sending electronic messages to mobile device users



The Rise of Texting

- Texting started out as the ability to send short simple messages, generally only between mobile users
- Now more complex messages can be sent with formatted text, pictures, and video
- The rise of smartphones and message apps have fueled texting as a dominant mode of communication
- Higher quality data is also available now to measure delivery, read receipts, and other key metrics for tracking performance

Texting is one of the main ways people communicate

90%

Have a smartphone

And 97% have a cell phone

90%

Use the internet daily

41% are online “almost constantly”

67,000

Text messages sent per second

And 18+ billion sent globally every day

98%

Open rate with text messages

Higher than email and other modes

Data based on US mobile users.
Pew Research Center, 2024, https://www.pewresearch.org/internet/2024/01/31/americans-use-of-mobile-technology-and-home-broadband/
CTIA, 2024, https://www.ctia.org/news/2024-annual-survey-highlights

Texting is most often used for contacting potential survey respondents but also can be used for data collection

Text invitations

Text reminders

Appointment confirmation/reminders

Text push to web

Text data collection

Sample Information and Texting

Cell phone numbers are needed to enable texting for surveys

- Cell phone random digit dial (RDD)
- Address based samples (ABS) with matched cell phone numbers
- Other list samples with matched cell phone numbers

Texting in surveys can potentially provide multiple benefits

- Decrease nonresponse bias
- Cost savings
- Speed of data collection

There are a variety of legal and technological considerations for the use of texting in surveys

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

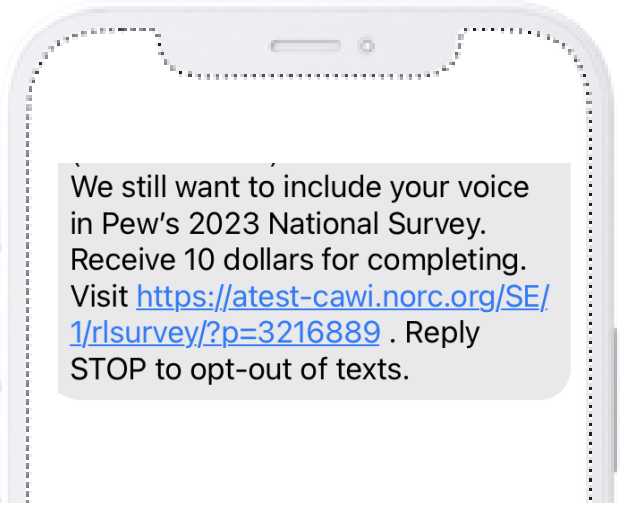
Technological Considerations

- 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

MMS offers expanded capabilities than SMS and can be more effective

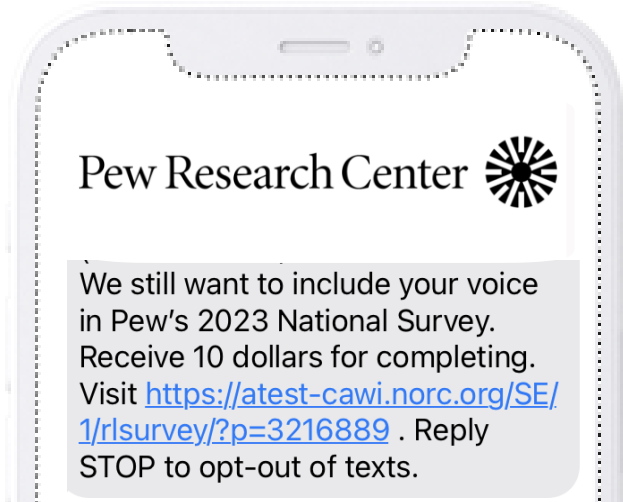
SMS (Simple Message Service)

- Short messages, 160-character limit
- Limited to alphanumeric characters
- All cell phones can receive; does not require a cellular data connection
- More suited to appointment confirmation/ reminders



MMS (Multimedia Messaging Service)

- Longer, formatted messages, 1600-character limit
- Allows for pictures, video and audio
- Requires a cellular data connection or access to the internet in some other way
- Best for survey text reminders and invitations



Recent Research on Texting

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Text vs. Postcard Reminder

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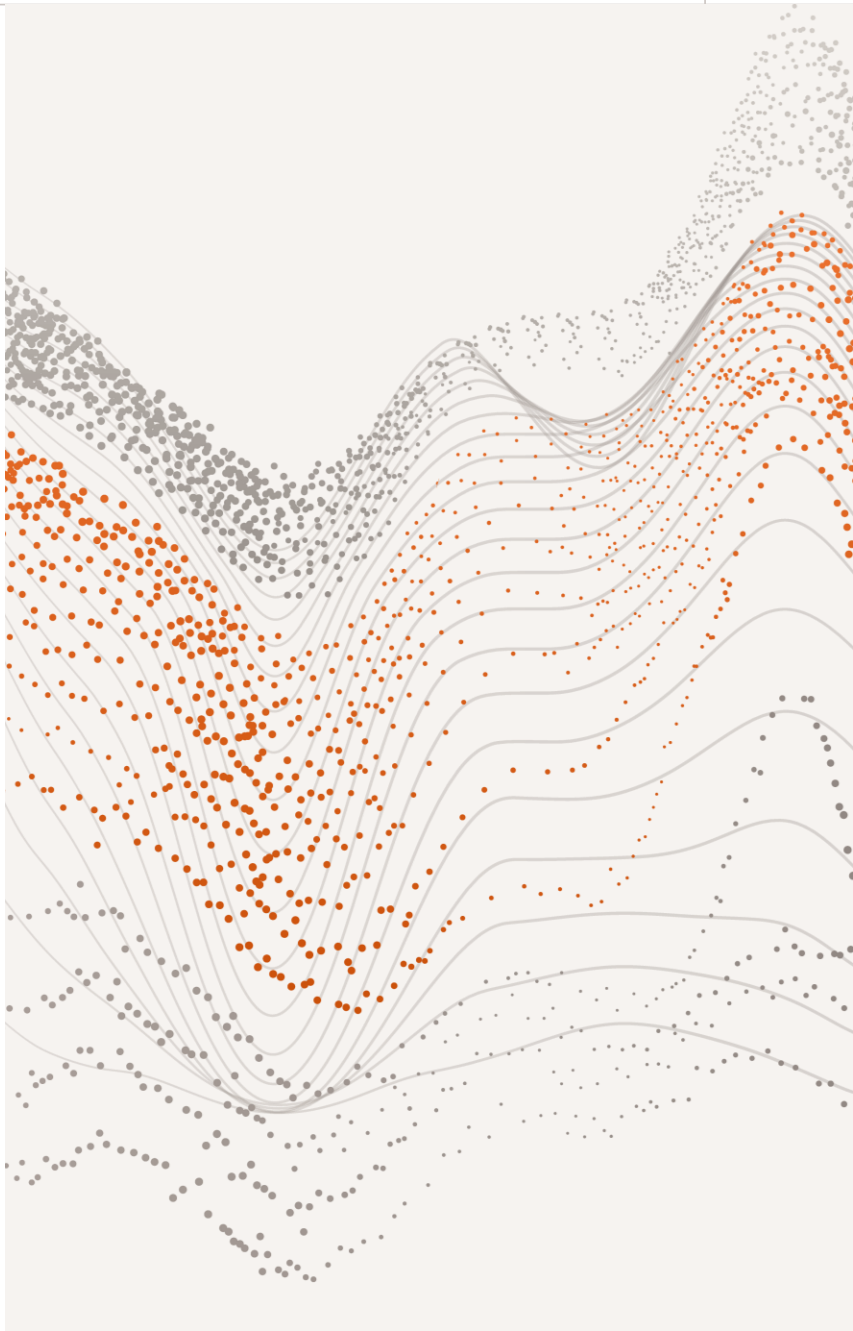
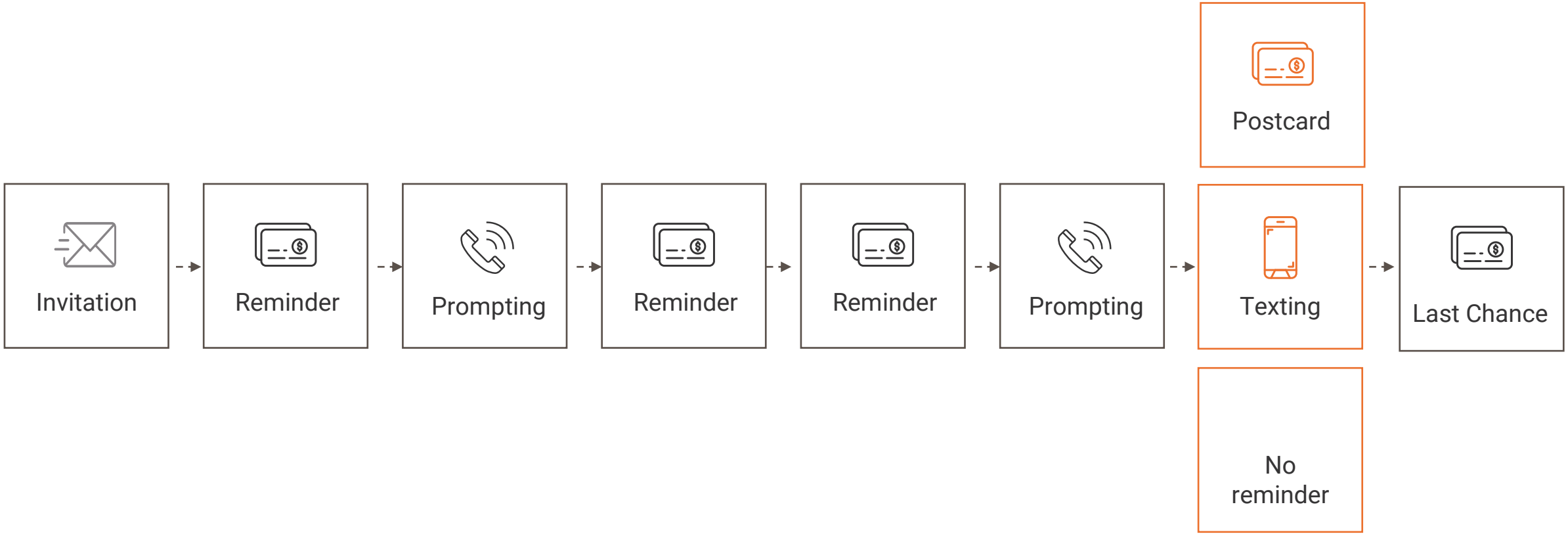
How does a text message reminder compare to a postcard reminder late in the field period?

- Experimental design:
  Text reminder, Postcard reminder, No reminder (control)
- Overall design included four mail or email contacts and phone prompting before the experiment
- Experiment tested in address-based sample portion of the survey among nonrespondents later in the survey



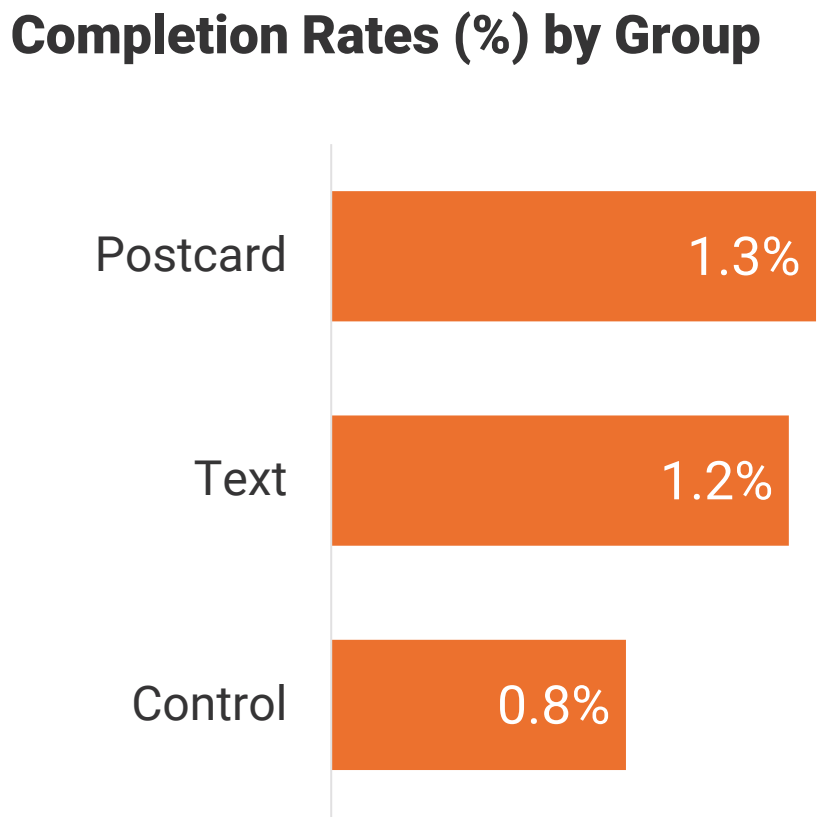
Contact strategy sequence and experimental treatments



Invitation and reminders were sent via mail or email based on email availability. Phone prompting only conducted with those with a matched phone number.

Experimental results

- Small increase in completion rates by sending out a reminder
- Text reminder performed similarly to a postcard reminder
- Text completes came in faster than postcard completes
- Reminder helped bring in demographics of need, include high school or less (esp. from postcard)



Text and postcard reminder significantly increased completion rates relative to control ($p<0.10$)

Texting cost less per complete than the postcard in this study

Costs	$1,210 (1,833 postcards at $.66 each)	$708 (1,862 texts at $.38 each)
Number of completes	22	23
Cost per complete	**$55.00**	**$30.78**

Mid and Late Text Reminder

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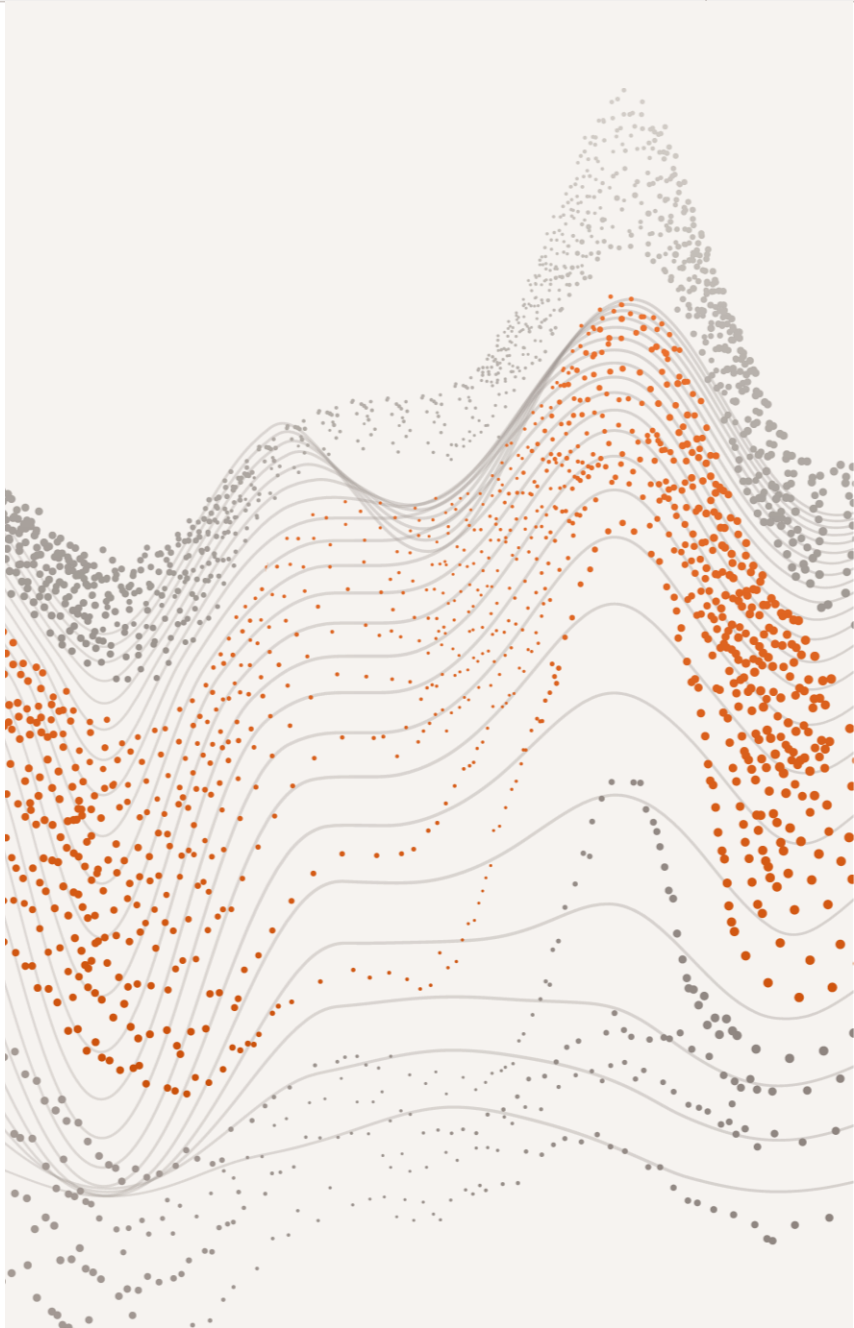
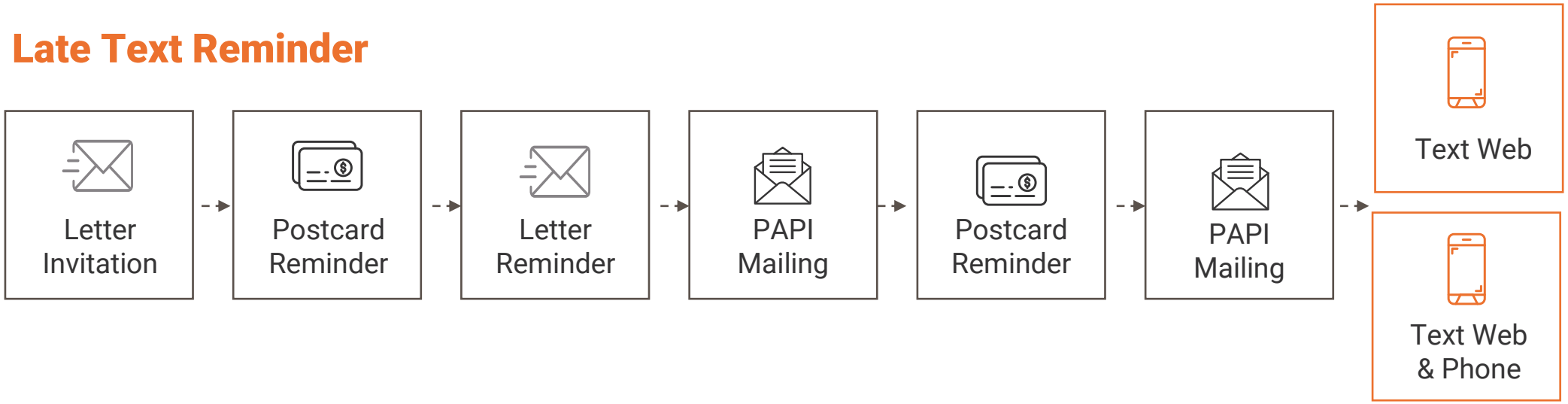
How effective are mid-field and late text reminders?

- Experimental design:
  Late – No Text (Control), Text Web Link, Text Web Link & Phone #
  Mid-Field – No Text (Control), Text Web Link
- Overall design included mail contacts, and paper and inbound phone completion options
- Experiment tested in large U.S. national address-based sample with matched cell phone numbers for texting

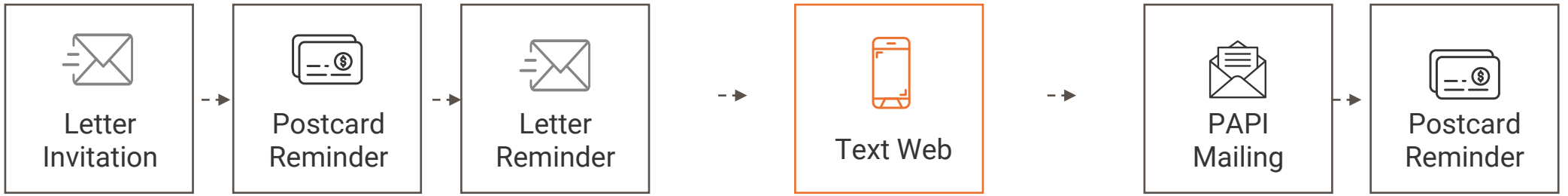


Contact strategy sequence and experimental treatments

Late Text Reminder



Mid-Field Text Reminder



Text reminders provided a small improvement in completion rates mid and late in the field period

Late Text Reminder

	Control	Text Reminder
Sample N	14,741	42,182
Completes	34	229
Completion Rate	**0.2%**	**0.5%**

Mid-Field Text Reminder

	Control	Text Reminder
Sample N	9,986	39,905
Completes	45	379
Completion Rate	**0.5%**	**0.9%**

Sending a text reminder doubles the response compared to no reminder but accuracy of phone number matching matters

Address Verification

- In the late text experiment, about half of respondents to the text verified that they lived at the sampled address
- In the mid-field text experiment, 39.5% of respondents to the text verified that they lived at the sampled address

Text Web vs. Text Web and Phone

- No significant difference in completion rate between the text web and text web and phone groups
- Most people responded online via the web link in both experimental groups
- Demographics were similar across the two groups

Text Invitation and Reminders

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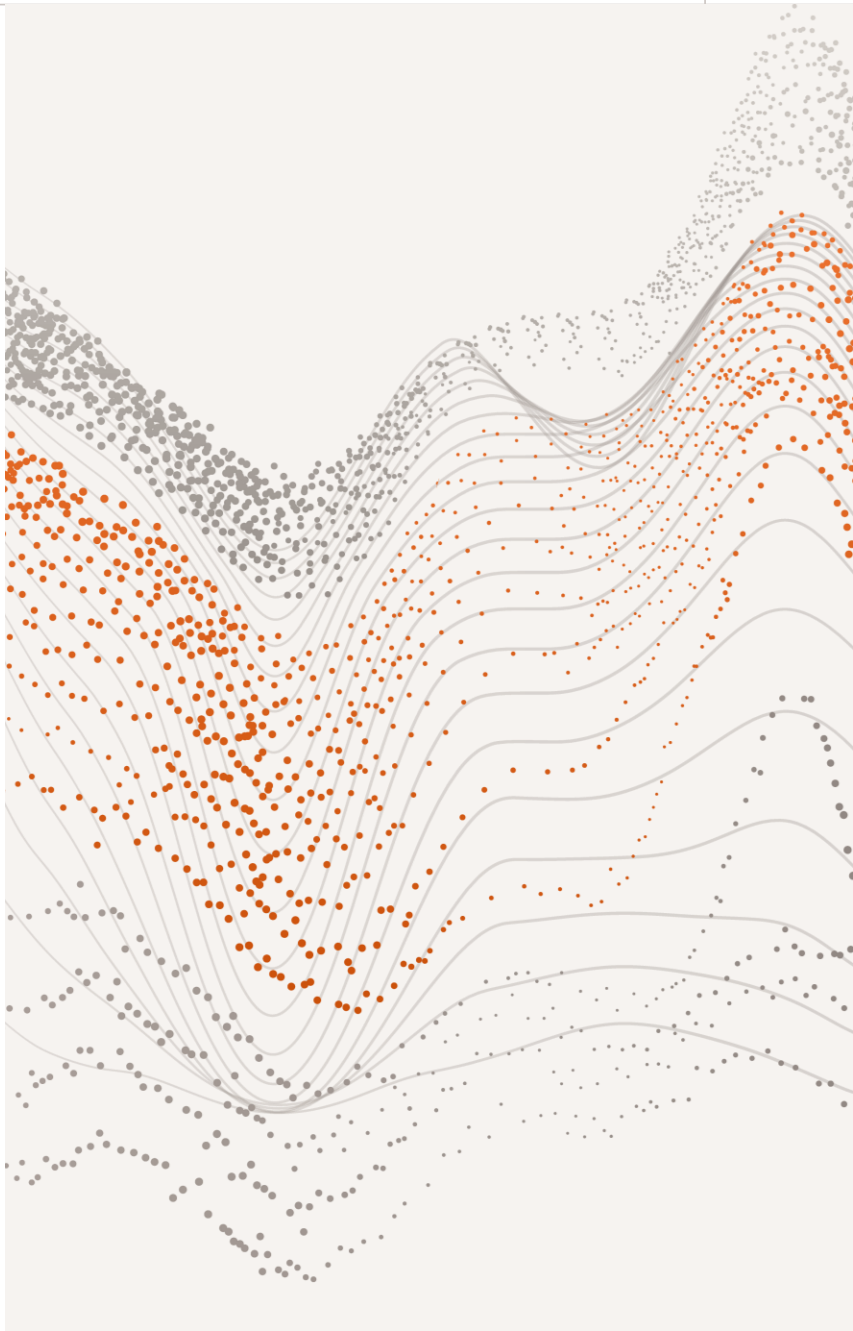
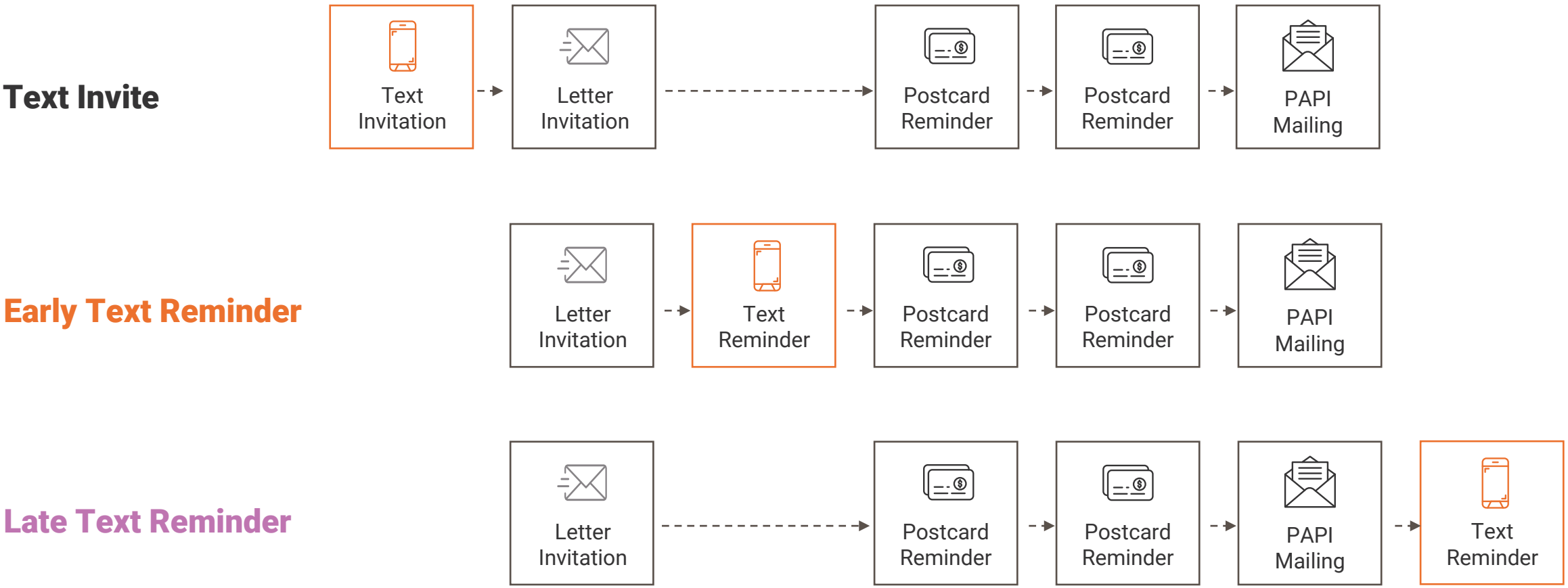
How effective are text invitations and reminders?

- Experimental design:
  Cooperative Respondents* – Early Text R, Late Text R
  Other Respondents – Text Invite, Early Text R, Late Text R
- Also experimented with timing of text contacts and text vs. email contacts
- Experiment tested in large U.S. nationally representative longitudinal survey where cell phone numbers and consent were provided by respondents in initial wave

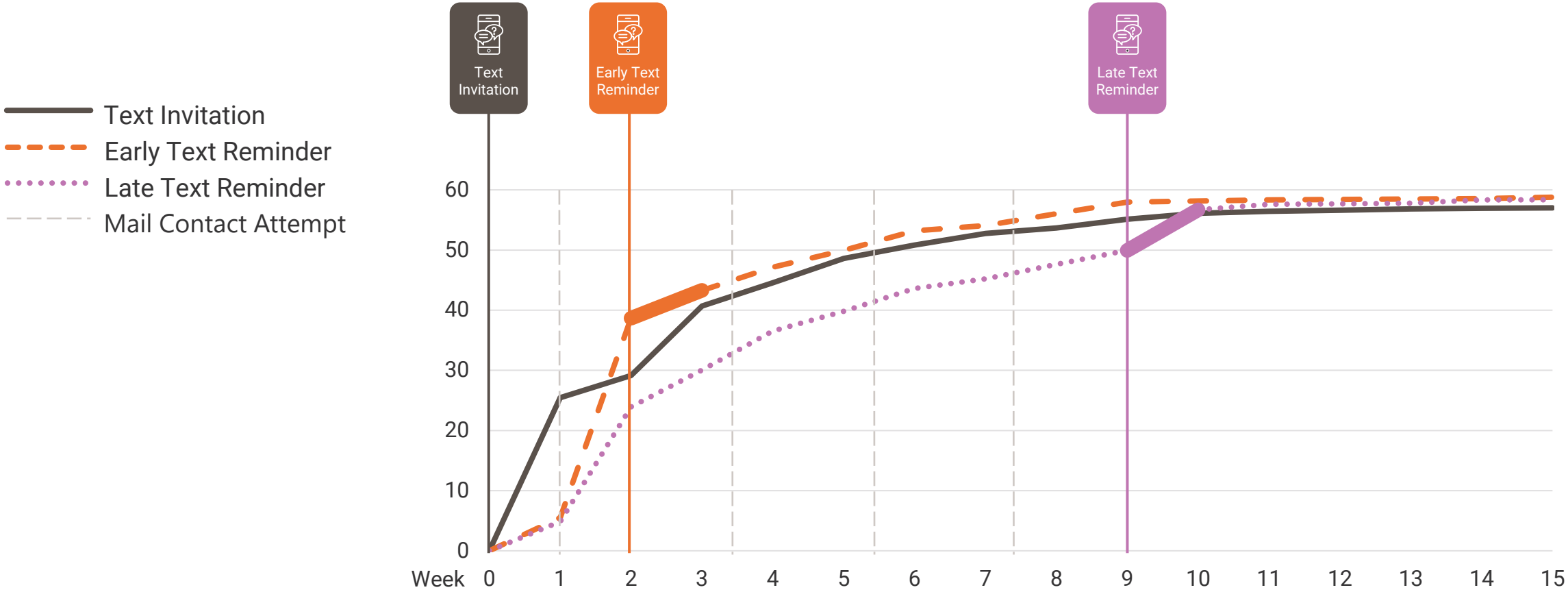


*Cooperative respondents completed the prior wave survey after receiving a text

Contact strategy sequence and experimental treatments



Text invitation group saw early boost in completion, early text reminder similarly more effective than late text reminder



Text invites and reminders can boost response during the field period

- **Text invite:** Boosted response early for a follow-up wave survey
- **Text reminders:** More effective than text invites, especially for cross-sectional surveys
- **Early text reminder:** Can help boost response rates early, response speed 5 to 8 days shorter, saving cost of later contacts
- **Time of day:** Sending the text in the morning vs. afternoon did not have a significant impact on the outcome measures analyzed
- **Smartphone completes:** Text invitations and reminders resulted in more completes via smartphone

Texting Best Practices

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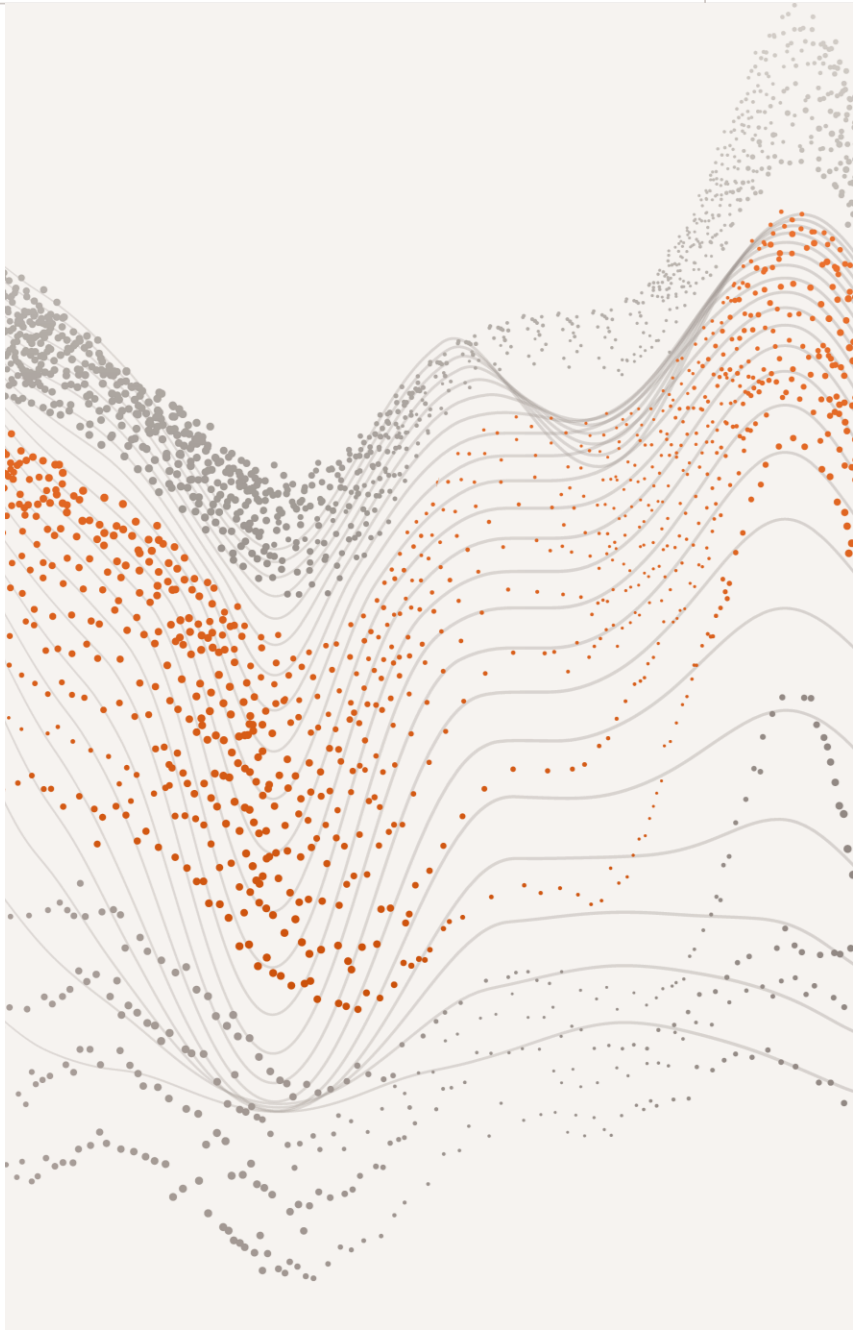
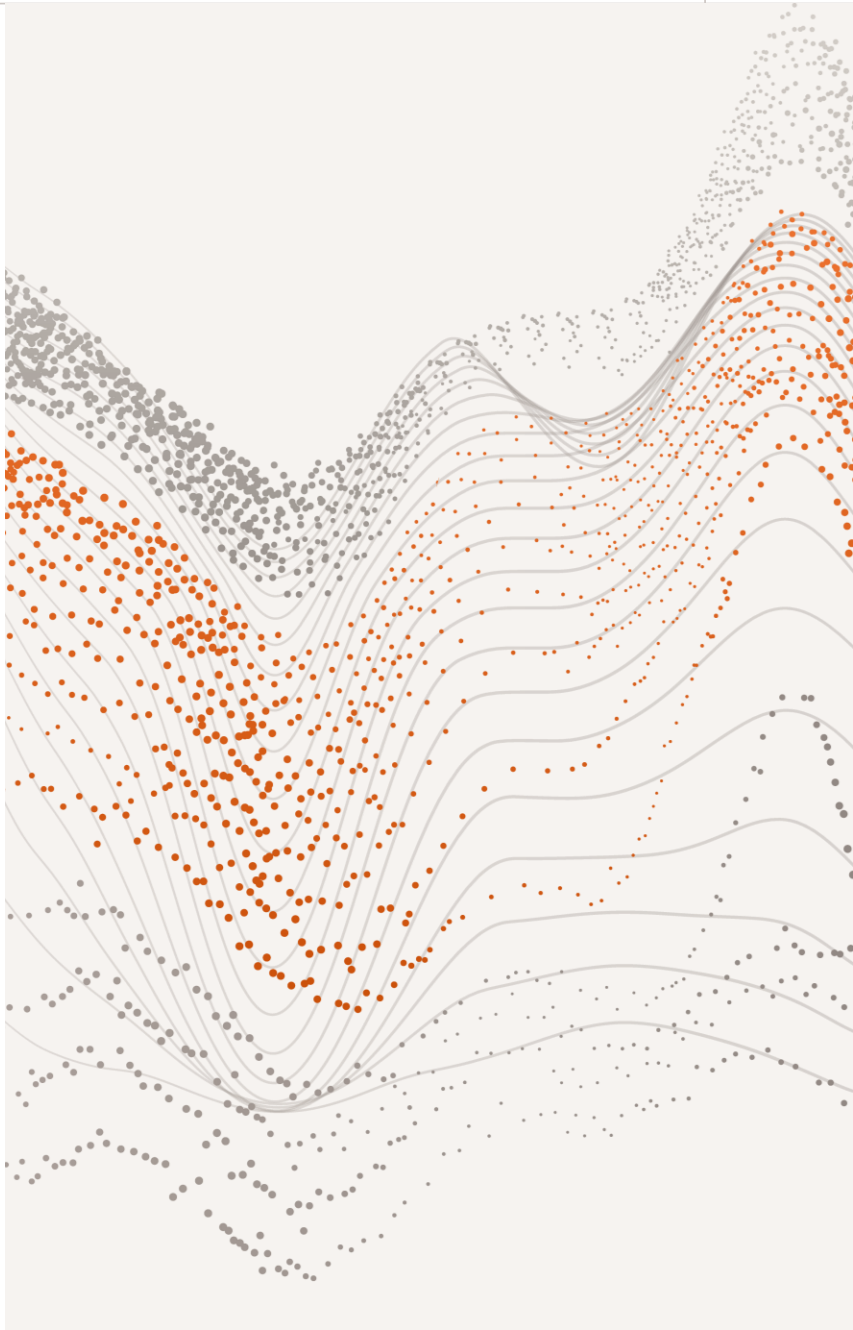
General Texting Best Practices

1. Register your texting campaign to help improve delivery (reduce blocking) across carriers.
2. Share information about your privacy policy.
3. Provide an opt-out mechanism including a way to stop future texts in each message (e.g., reply STOP to end) and confirm opt-out.
4. Monitor text delivery and response; troubleshoot any issues.
5. Confirm opt-in for consented texting.
6. Maintain a “do not text” list.



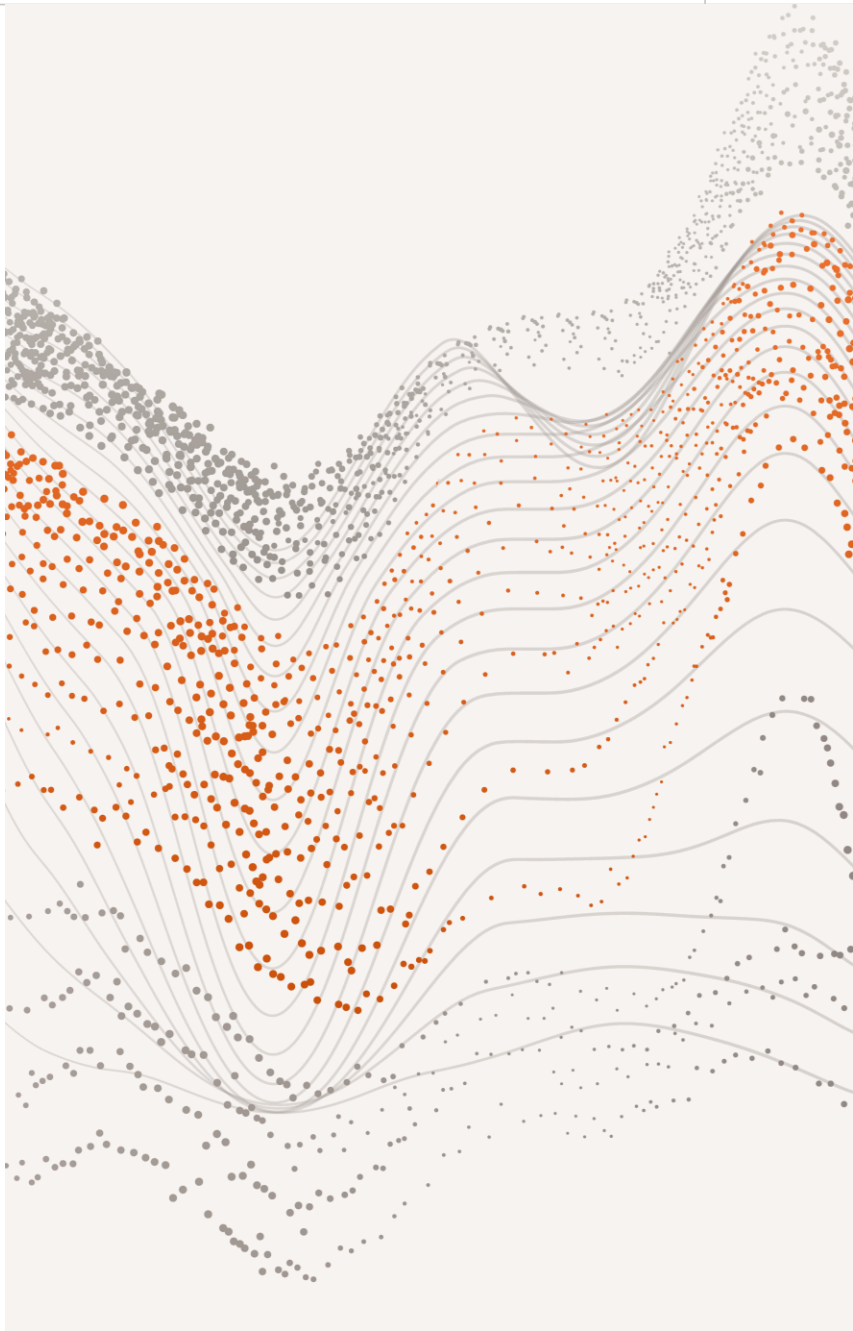
Respondent Experience Texting Best Practices

7. Use respondent focused language.
8. Try to make a connection with the study and potential respondents.
9. Send texts during commonly accepted hours (~8a-9p local time).
10. Follow web and mobile design best practices (expect responses via smartphones).
11. Prepare for responses to come in quickly.



Text Messaging Best Practices

12. Shorter texts generally perform better.
13. Use a sponsor or study logo to help provide legitimacy.
14. Have a clear concise introduction.
15. Use telephone numbers local to the sponsor or to the sample member to enhance legitimacy.
16. Provide information about any incentive offered.



Future Directions

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Texting is now a key contact mode for surveys that can be integrated in mixed-mode designs.

Contact Modes

Using multiple modes of contact can improve response rates and representativeness

Text Invites

More effective in panel & longitudinal studies when trust and legitimacy is already established

Text Reminders

Effective for boosting response, especially when varied with other modes

Mobile Design

Use of texting increases response by smartphone, mobile friendly design is critical

Speed

Text contacts can be especially helpful when responses are needed quickly

More research on texting as a data collection mode is needed

- Short simple surveys
- “In the moment” surveys
- AI assisted surveys

Thank you to my collaborators!

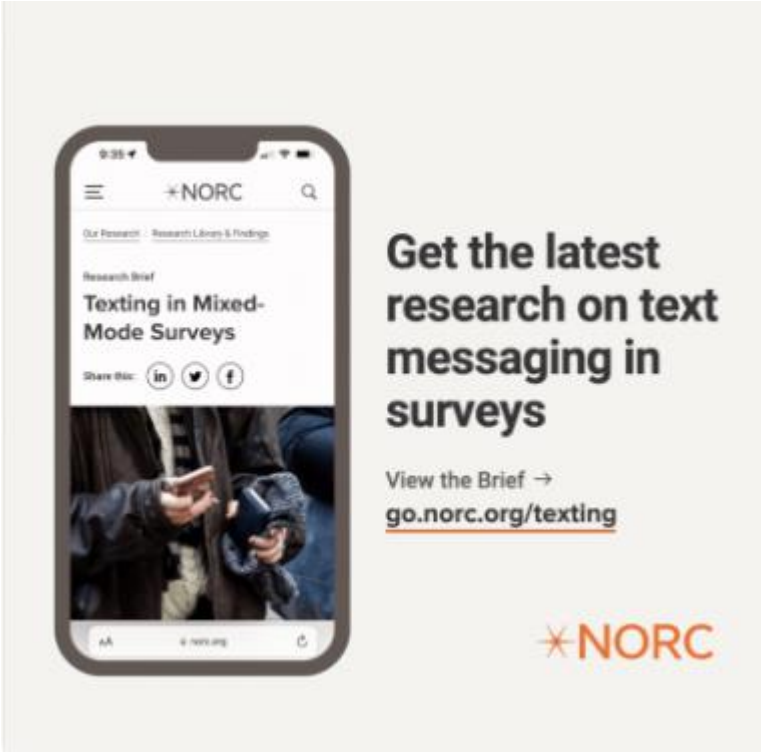
Christopher Hansen

Martha McRoy

Zoe Slowinski

Hanyu Sun

For more information:



go.norc.org/texting

Thank you.

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