



SURVEY FUTURES

SURVEY DATA COLLECTION
METHODS COLLABORATION

Recruitment methods for surveys without field interviewers: Literature review

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About *Survey Futures*

- This research was supported by UKRI-ESRC strategic research grant ES/X014150/1 for ‘Survey data collection methods collaboration: securing the future of social surveys’
 - This is also known as *Survey Futures*.
- It is directed by Professor Peter Lynn (University of Essex) and is a collaboration of twelve organisations, benefitting from additional support from:
 - The Office for National Statistics (ONS).
 - The ESRC National Centre for Research Methods.
- This presentation is for research done within *Research Strand 4: Surveys without field interviewers*, led by Professor Olga Maslovskaya (University of Southampton).
- The project ‘aims to deliver a step change in survey research to ensure that it will remain possible in the UK to carry out high-quality social surveys of the kinds required by the public and academic sectors, to monitor and understand society, and to provide an evidence base for policy.’
- Further information can be found at www.surveyfutures.net.



Outline

- Literature search
- Invites and reminders (Invitations and questionnaire access, reminders)
- Response modes (Single-mode and mixed-mode designs)
- Recruitment materials (Survey sponsors, postage, envelopes)
- Incentives (Presence, timing, type, amount)
- Conclusions

Literature search

- We conducted a systematic search between January – June 2024 to identify research **literature** on **self-completion surveys**:
 - Interested in surveys that used **address-based sampling frames**.
 - Specifically considered recruitment practices, as well as survey quality indicators such as response rates, representativeness, survey costs.
 - We searched various databases: Web of Science, Scopus, International Bibliography of the Social Sciences, APA PsycInfo, and Academic Search Ultimate.
- We found a wide range of literature that included:
 - A **Cochrane review, systematic reviews and meta-analyses**.
 - **Experimental** studies, **reports** and some **grey literature**.

Invites and reminders: Invitations and questionnaire access

- Mode of contact is influenced by the information available from the sampling frame:
 - Mail is the most used in address-based sampling frames (Olson et al. 2019).
- In mailed push-to-web invitations, offering **multiple methods** of accessing the questionnaire improved response rates (Endres et al. 2023; Marlar and Schreiner 2024; Maslovskaya et al. 2024):
 - Including a **QR code**, in addition to a **URL** modestly improved response rates than a **URL only**.
 - **QR codes** led to increased **completion of questionnaires online**, and via **mobile devices**.
- For mailing days:
 - Sampled members **receiving an invitation** on a **Friday** were **significantly more likely** to access and begin the survey than those **receiving the invitation** on a **Monday** (ONS 2018).

Invites and reminders: Reminders

- Follow-up reminders are one of the most effective determinants of high survey response for self-completion surveys (Daikeler et al. 2020; Dillman et al. 2014; Edwards et al. 2023):

- A strategy with **at least two reminders** achieved the greatest benefit compared to **one reminder**.
- No significant difference** in the response rate between **two** and **three or more** reminders (Jia et al. 2023; Sun et al. 2020).

Table 1 Meta-regression assessing the impact of reminders in the response rate

	With monetary incentive		Without monetary incentive	
	Coefficient (95% CI)	P value	Coefficient (95% CI)	P value
1 round of reminder	0		0	
2 rounds of reminders	0.16 (0.03–0.29)	0.021	0.16 (0.02–0.29)	0.028
3+ rounds of reminders	0.18 (0.04–0.32)	0.015	0.15 (0.01–0.29)	0.042

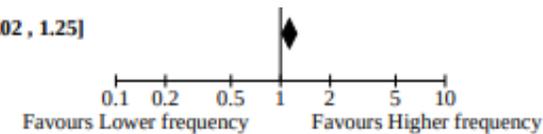
(Jia et al. 2023:506)

- Two or three reminders** appear to be the **optimum** number of reminders.

Invites and reminders: Reminders

- Intervals between reminders:
 - Strategies with **shorter intervals** between reminders (higher frequency: **1.5 – 3 weeks**) resulted in **increased odds** of response than those with **longer intervals** (lower frequency: **3 – 6 weeks**) (Edwards et al. 2023).

Total (95% CI)	3274	4246	100.0%
Total events:	1226	1431	
Heterogeneity: Tau ² = 0.00; Chi ² = 4.17, df = 5 (P = 0.52); I ² = 0%			
Test for overall effect: Z = 2.43 (P = 0.02)			
Test for subgroup differences: Not applicable			



(Edwards et al. 2023:695)

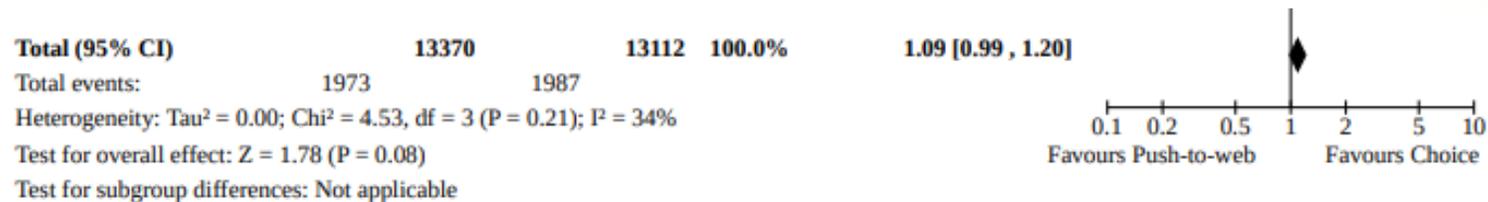
Response modes: Single-mode and mixed-mode designs

- Among single-mode designs, evidence suggested that the **web mode** consistently yielded **lower response rates than other modes** (Anhang Price et al. 2022; Daikeler et al. 2020; Weigold et al. 2019):
 - **Web mode** increased response rates among sample members with the **highest levels of education**, while this had **no effect** among those with the **lowest levels of education** (Heimel et al. 2024).
 - **Mail mode** enhanced survey response among those with **lower levels of education** as well as **older respondents** (Kelfve et al. 2020).
- **Mixed-mode** designs yielded **higher response rates and more representative samples than single-mode** designs (Anhang Price et al. 2022; Cornesse and Bošnjak 2018):
 - Likely due to offering respondents different modes of responding to the survey.

Response modes: Mixed-mode designs

- Sequential versus concurrent designs:

- Experimental evidence is **inconclusive** in terms of the most effective design.
- No significant difference** in response rates between **sequential web-mail** and **concurrent web and mail** (choice) designs (Edwards et al. 2023; Heimel et al. 2024; Suzer-Gurtekin et al. 2019).

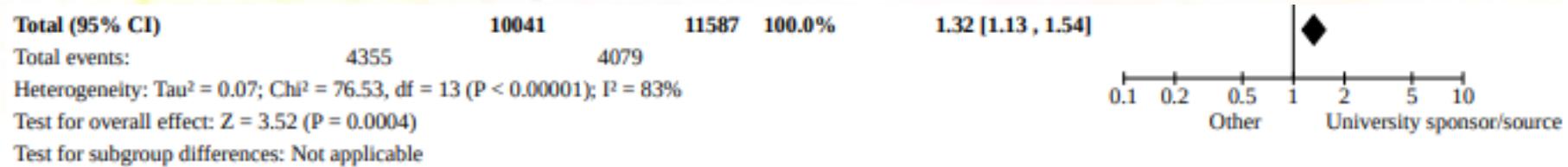


(Edwards et al. 2023:705)

- Sequential web-mail** design resulted in higher percentages of **web responses** than the **concurrent web and mail** design (Heimel et al. 2024; Suzer-Gurtekin et al. 2019).
- Cost per response** was lower for the **sequential** design compared to the **concurrent** design (Heimel et al. 2024).

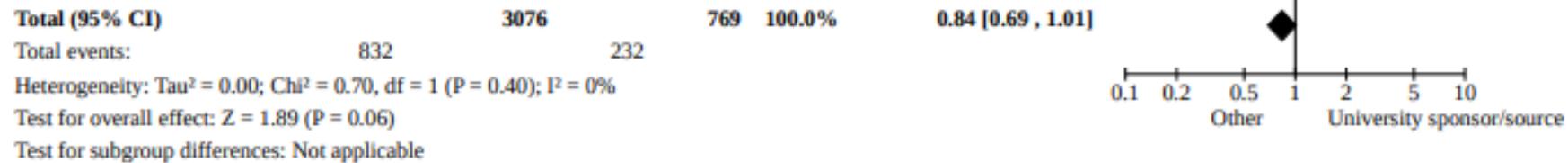
Recruitment materials: Survey sponsorship

- **Mail questionnaires** originating from **universities** were associated with higher odds of response compared to those from **other sponsors** (government departments or commercial organisations):



(Edwards et al. 2023:723)

- This was not the case for **web questionnaires**, the difference was **not significant**:



(Edwards et al. 2023:724)

Recruitment materials: Postage

- Outgoing mailing:
 - **First-class** postage yielded greater odds of response than **second-class** mailing.
 - While response rates for **first-class** and **priority mail / special delivery** (faster and provides tracking services) were **not significantly** different, **first-class mail** was **more cost-effective** (DeBell et al. 2020; Edwards et al. 2023; Zhang et al. 2023).
- Return mailing:
 - **Stamped return envelopes** were associated with greater odds of response compared to **prepaid business** or **franked** reply envelopes.
 - **Multiple stamps** on return envelopes increased the odds of response compared to using a **single stamp**.
 - The choice between **first-class** and **second-class** stamps on return envelopes had **no significant effect** on the odds of response.

(Edwards et al. 2023)

Recruitment materials: Envelopes

- In self-completion surveys, the design and presentation of the envelope or mailer are critical in influencing whether it will be opened (Lavrakas et al. 2018).
- Envelope colour:
 - **Brown envelopes** had a slightly higher response rate compared to **white envelopes**, but the difference was **not significant** (Edwards et al. 2023; ONS 2018).
- Envelope size:
 - **No significant difference** in overall response rates between **larger non-standard** size envelope (6 × 9) and **standard size** envelope (4.125 × 9.5) (Endres et al. 2023).
- Envelope branding:
 - The ONS (2018) investigated the effect of branded envelopes, **featuring regionalised material**, and found **no significant difference** in response rates between **branded** and **unbranded envelopes**.

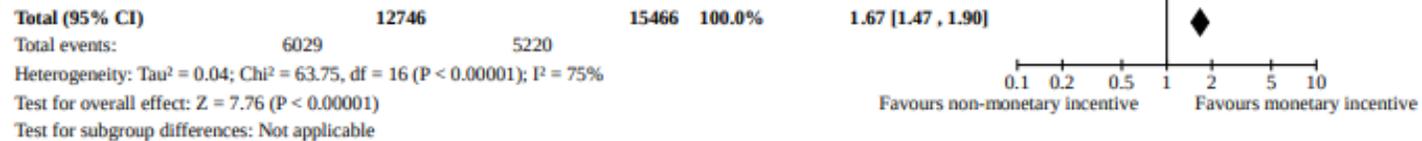
Incentives

- Presence:
 - **Presence of incentives** (regardless of type) led to increased response rates compared to **no incentives** (Abdelazeem et al. 2023; Anhang Price et al. 2022; Edwards et al. 2023).
- Timing:
 - **Unconditional (or prepaid)** incentives were more effective at improving survey response than **conditional (or promised)** incentives (Abdelazeem et al. 2023; Anhang Price et al. 2022).
 - Even if the **monetary value** of the **unconditional** incentive was **lower** (Smith et al. 2019).
 - Incentives provided with the **initial invitation** resulted in higher response rates than those offered in **subsequent mailing** (Anhang Price et al. 2022; Edwards et al. 2023).
 - Strategies **combining unconditional and conditional** incentives were **more effective** than either **unconditional** or **conditional incentives** alone (Abdelazeem et al. 2023; Edwards et al. 2023; Sammut et al. 2021).

Incentives

- Types:

- **Monetary incentives** yielded higher response rates than **non-monetary incentives** (Abdelazeem et al. 2023; Anhang Price et al. 2022; Edwards et al. 2023).



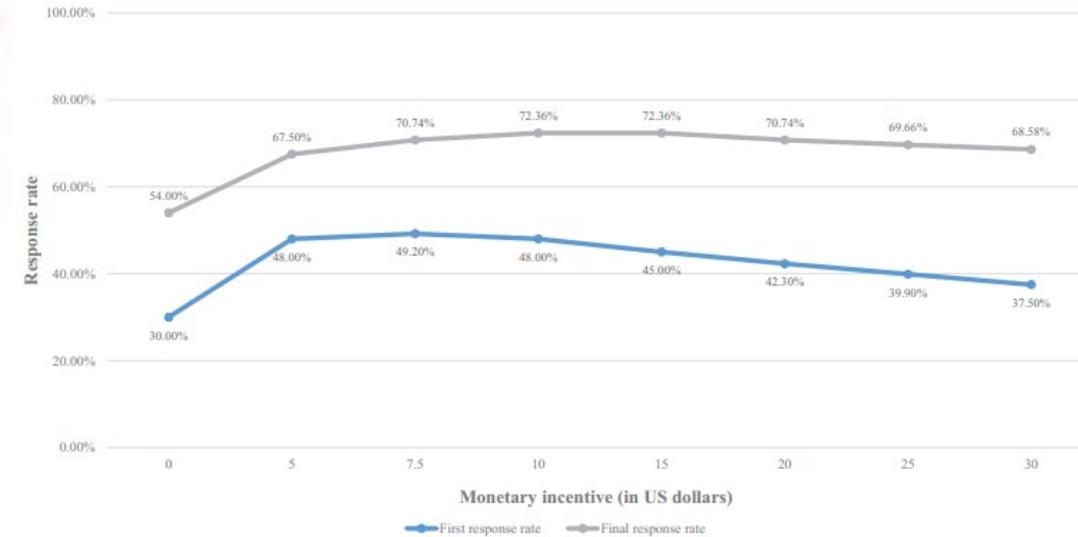
(Edwards et al. 2023:610)

- **Cash incentives** were more effective at improving response rates than **vouchers / gift cards** or other **non-monetary incentives** (McKernan et al. 2022; Sammut et al. 2021; Smith et al. 2019).
 - A strategy offering a **£5 gift voucher (unconditional)** with a **£10 conditional gift voucher** was more effective than **unconditional £5 gift voucher** or **tote bag** (ONS 2018).

Incentives

■ Amount:

- There was **no clear correlation** between the **value of incentives** and **response rates** (Abdelazeem et al. 2023).
- **Larger incentives** tend to be more effective than **smaller ones** (Edwards et al. 2023), although evidence suggests there are diminishing returns.
- Jia et al. (2021) found an **optimal amount** of between **US\$5** and **US\$15**, but the **increase** in response rates was at a **declining rate**.
- In the UK, incentive amounts of **£5** or **£10** were typically offered (Booth et al. 2024).



(Jia et al. 2021:506)

Conclusions

- Offering multiple methods of questionnaire access improved response rates:
 - Including QR codes increased the likelihood of online completions, and via mobile devices.
- Two or three reminders appeared to be the optimum number of reminders.
- Shorter intervals between reminders resulted in increased odds of response.
- Mixed-mode designs were more effective in terms of response rates and representativeness than single-mode designs:
 - Evidence on the most effective design between concurrent and sequential designs was inconclusive.
 - Sequential web-mail design resulted in higher proportion of web responses and lower cost per response.

Conclusions

- Special delivery and first-class mailing were more effective for outgoing mail, while stamped return envelopes and multiple stamps on return envelopes were more effective.
- There were no differences in response rates based on the colour, size or branding of envelopes.
- The presence of incentives was effective in increasing response rates.
- Unconditional incentives yielded higher response rates than conditional incentives:
 - Monetary incentives were more effective than non-monetary incentives.
 - Larger incentives were also more effective than smaller incentives, but with diminishing returns.

Thank you!



Questions and comments.

