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The Effectiveness of Differential Incentives in Social Surveys

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Background

- Strong evidence that incentives can increase response rates
- However, incentives do not necessarily reduce bias
- Declining response rates have led to increased interest in **differential incentives**
- Offering larger incentives to typically under-represented groups could be a cost-effective way to improve representativeness
- Evidence on the effectiveness of **differential incentives** remains limited and mixed

Evidence review

- Key findings on the use of differential incentives in the UK and internationally (~40 studies reviewed)
- Based on literature review, conference presentations, and information gathering from agencies and major surveys

Definitions

- **Differential incentives:** Any variation in incentive amounts across respondents
 - **Targeted incentives:** Offering higher incentives to certain groups (e.g. under-represented or hard-to-reach), based on characteristics or prior behaviours
 - **“Early-bird” incentives:** Offering a higher incentive for responding within an early deadline (e.g. first few weeks) to encourage quick completion
 - **Non-response (refusal conversion) incentives:** Increasing the incentive later in fieldwork for those who have not responded or initially refused
 - **Discretionary incentives:** Allowing interviewers to offer additional incentives case-by-case to particularly reluctant respondents

Targeting – Evidence Overview

- **Targeting by prior response – longitudinal studies**
- **UK evidence – Next Steps Age 32 Survey**
- £25 for prior-wave non-respondents; £15 for prior-wave respondents (£20 for all in control group)
- No differences in response rates or representativeness
- **International evidence (US):** Several examples where larger incentives offered to prior-wave non-respondents or harder-to-reach groups improved response rates (but at higher cost), e.g. SIPP, National Longitudinal Survey of Women, PSID Child Development Supplement

Targeting – Evidence Overview

Targeting by characteristics:

- **Deprived areas:**
- Generations and Gender Survey 2023
- **Free school meals:**
- COVID Social Mobility and Opportunities Study (COSMO)
- **Young / Ethnic Minorities:**
- Opinions and Lifestyle Survey

Targeting – Novel experimental evidence

- **Experiment** embedded in the British Social Attitudes Survey 2025
- Repeated cross-sectional study
- Limited information for targeting: sampling via Postcode Address File
- Targeting was based on **area deprivation (IMD deciles)**
- **Push to web survey** (mail invitation, possibility to participate by telephone)
- Aim to interview up to 2 adults per household

Experimental design

Index of multiple deprivation, deciles	Targeted	Control
Most deprived	£20	£15
2nd		
3rd		
4th		
5th	£15	
6th		
7th	£10 (£15 in London)	
8th		
9th		
Least deprived		

In the **control group only**:
oversampling the most deprived
deciles

BSA experiment conclusions

- Equal adjusted response rates (11.4% vs. 12.0%)
- Targeted design led to higher response rates in the most deprived decile, and lower response rates in all the least deprived deciles (7th -10th).
- No significant differences in representativeness by sex, marital status, ethnicity, rural area or SES.
- Larger share of older respondents in the non-targeted design.
- In the non-targeted group, oversampling improved representativeness by IMD deciles.
- No significant differences in fieldwork progression.
- Targeted design about 5% less expensive.
- Is there a threshold effect?

Targeting – Evidence Overview

- Incentive experiments conducted in many studies (incentive vs no incentive or comparison of 2 incentive amounts)
- Enables exploration of incentive effects on sub-groups
- Findings across countries and studies are highly mixed
- In longitudinal studies, effects of incentives based on prior participation are also mixed

Early-bird incentives – evidence overview

- **Concept:** Higher incentive for responding early (often to encourage web completion)
- Widely tested in the UK (Next Steps, Understanding Society, Food and You)
- Consistently associated with faster responses and more web responses in mixed-mode designs
- Control group response rates typically catch up: final response rates are similar
- No evidence of increased bias
- International evidence shows a similar pattern
- Can increase incentive costs but improve fieldwork efficiency

Non-response / refusal conversion – evidence overview

- **Concept:** Start with a lower incentive; increase later for non-responders or refusers to concentrate spend on the hardest cases
- **International evidence:** US studies show effectiveness (e.g. Health and Retirement Study, 1992: \$100 to initial refusers → ~4% increase in overall response)
- **UK evidence:** Limited but emerging, with recent pilots and experiments
- **Examples (UK):**
 - **BSA 2024:** £10 baseline; £15 after 2nd reminder achieved similar response to always £15, but at the cost of the £10 design, with minor shifts in sample composition
 - **Early Life Cohort (ELC) 2024 pilot:** Combined refusal conversion with area-based targeting (higher incentives in selected NI/Scotland regions); delivered a ~4–5 pp increase in final response in targeted areas

Discretionary incentives – Evidence Overview

- **Concept:** Interviewers can offer an additional incentive ad hoc if they believe it will convert a reluctant respondent
- **UK evidence:**
 - National Travel Survey (2018–19): Interviewers could offer bonuses (up to £50)
 - Result: No significant overall increase in response rates; interviewers not always comfortable using discretion
- **International evidence:** Rarely documented; some US surveys (SPD, SIPP) allowed discretionary ~\$40 incentives, with no formal evaluation
- Little concrete evidence of benefit and complex to implement (requires clear guidance and interviewer training)

Conclusions & key takeaways

- Growing interest in differential incentives in the UK
- **Targeted incentives:** Promising but unproven; UK evidence remains scarce and further trials are needed
- **Early-bird incentives:** Most consistently effective; speed up responses (web-first) and increase efficiency
- **Refusal conversion:** Small late gains possible and can be cost-efficient, but more experimental evidence is required
- Differential incentives can potentially improve fieldwork, but require careful design and cost–benefit analysis
- Ethical considerations require careful thought (as per later talk!)



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Thank you for your attention!



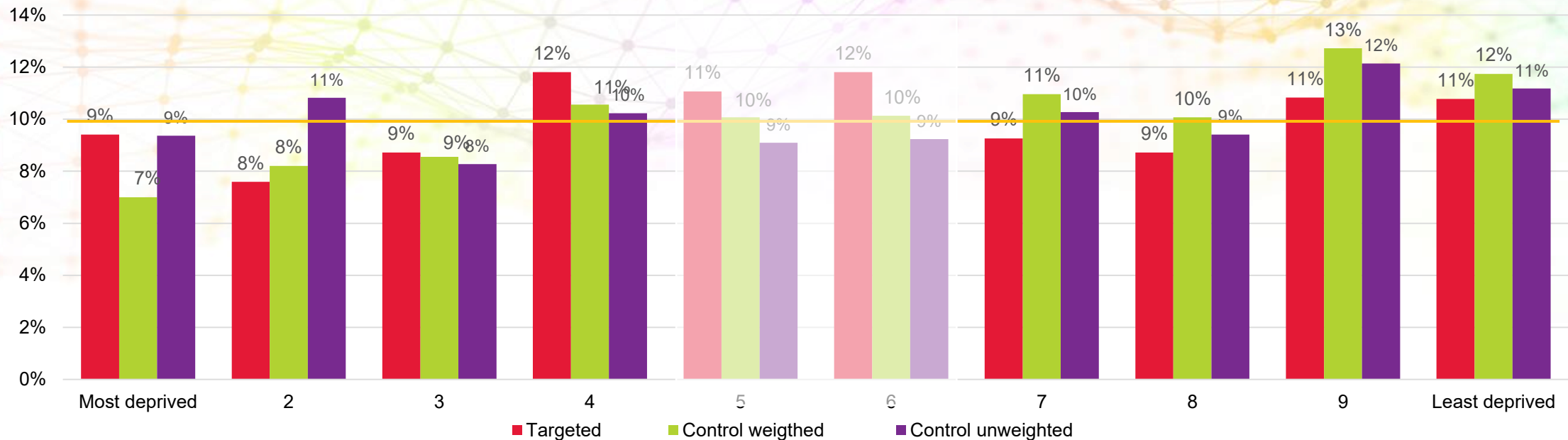
Appendix

Adjusted response rates, unweighted for oversampling



Adjusted for estimated share of ineligible addresses (10%) and number of eligible adults per household (1.9)

Sample by IMD deciles (ex. London)



Total absolute deviation from a perfectly uniform distribution (10% per IMD decile)

- Targeted and unweighted control groups were equally uneven compared to a perfect 10% in each IMD decile.
- After weighting, the control group was closer a perfectly uniform distribution (9.3 percentage points away) than the targeted design (12.6 points away).