# Exploring New Paradata from Text & Email Contact Attempts in Federal Survey Data Collection

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# Background – Contact History Instrument (CHI)

- Used by Census interviewers (Field Representatives, or FRs) to record each contact attempt in select Federal surveys
  - CHI captures **mode** of contact attempt on first screen
    - Mode options formerly limited to personal visit or telephone
    - Following CHI screens capture other data (e.g., whether contact made, whether interview completed, contact strategies, respondent concerns)
  - New CHI mode options added in 2022 for **text and email** contacts
    - May not be used to conduct an interview, but may be used to make contact for other reasons
    - New following CHI screens capture whether text/email was outgoing/incoming, purpose(s) of contact attempt, who sent an incoming message

# CHI Text/Email Screens (1)

**CONTACT HISTORY INSTRUMENT**

**Describe this contact attempt.**

- 1. Personal visit
- 2. Telephone (outgoing)
- 3. Telephone (incoming)
- 4. Not attempting contact
- 6. Text or Email

Continue CHI / Exit

**TEXT MESSAGE OR EMAIL**

**Select the type of Text or Email message:**

- 1. Outgoing text
- 2. Outgoing email
- 3. Incoming text
- 4. Incoming email

Text or Email

Outgoing Text or Email

# CHI Text/Email Screens (2)

## OUTGOING TEXT MESSAGE OR EMAIL

• What was the purpose of the Outgoing Text / Email message?
• Enter all that apply, separate with commas.

- ☐ 1. Appointment reminder / Confirmation
- ☐ 2. Request appointment
- ☐ 3. Provide requested information / Links
- ☐ 4. Reminder for a returning case
- ☐ 5. Text / Email non-response
- ☐ 6. Text / Email not valid
- ☐ 7. Other

| Text or Email | 1 | Outgoing_Text |
|---|---|---|
| Outgoing Text or Email | | |

## INCOMING TEXT MESSAGE OR EMAIL

• What was the purpose of the Incoming Text / Email message?
• Enter all that apply, separate with commas.

- ☐ 1. Schedule appointment
- ☐ 2. Responding to Call / Email / Text / Letter
- ☐ 3. Refused
- ☐ 4. Asked for no additional texts or emails
- ☐ 5. Asked question or requested more information
- ☐ 6. Other

| Incoming Text or Email | | |
|---|---|---|

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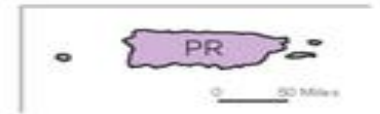SCA

# Research Questions

- How common is text/email usage in Federal surveys?

- How does text/email usage vary by Census Regional Office (RO)?

- What are the most common reasons for text/email usage?

Census Bureau Regional Office Boundaries

# Data

- All CHI records in 2023 from two housing unit (HU) surveys
  - American Community Survey (ACS)
    - 300k HUs sampled monthly (55k HUs sampled for field interviews)
    - Data collected through mail/web response, with field sampling for nonresponding HUs
    - Non-longitudinal, one interview per HU
  - Current Population Survey (CPS)
    - 60k HUs sampled monthly
    - All data collected through CATI/CAPI
    - Longitudinal, eight interviews per HU
      - Monthly interviews for four months (1-4), then eight months break, then monthly interviews for four months (5-8)
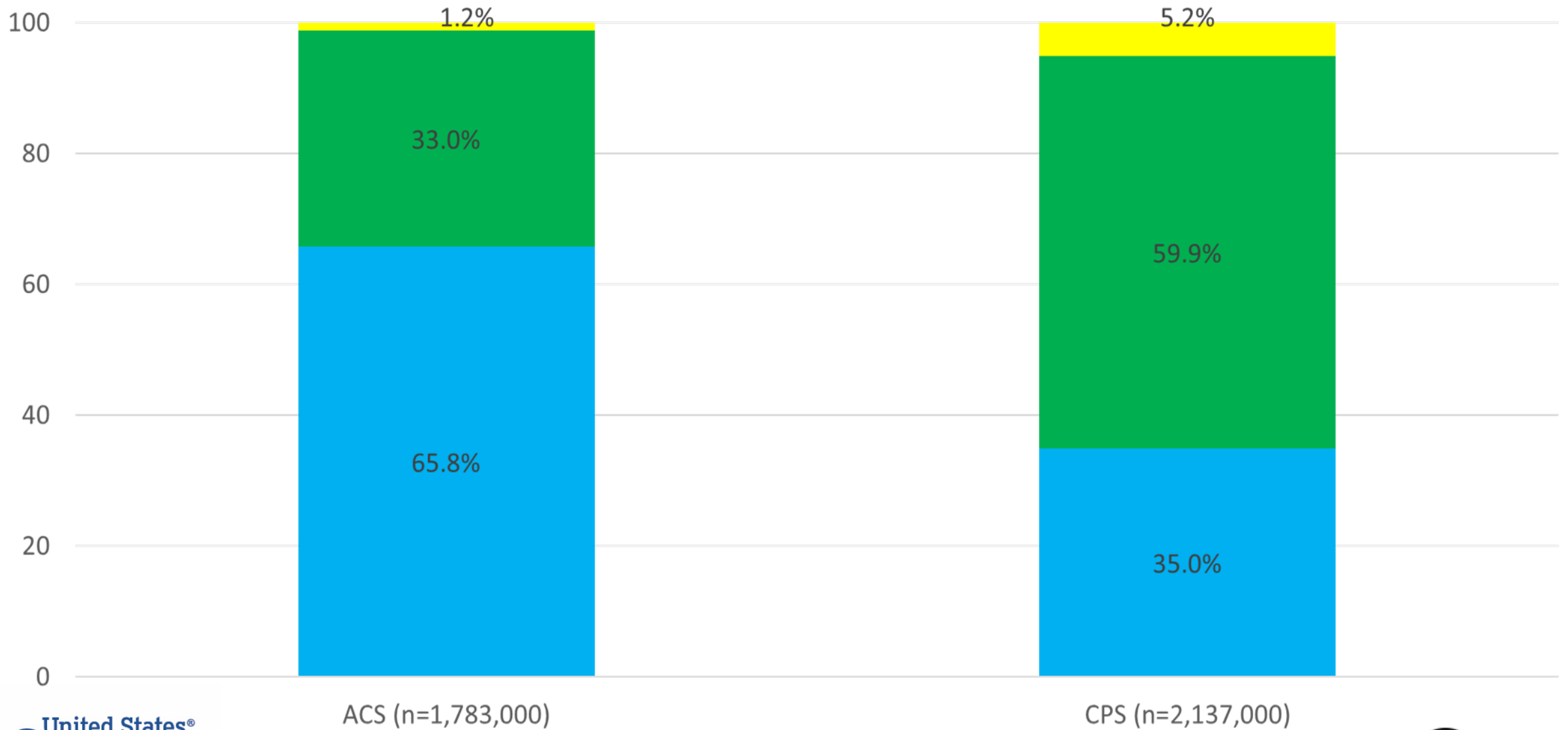
# Methods*

- For both surveys, compute percentage of:
  - Contact attempts made via text/email
  - FRs with any text/email usage (overall and by RO)
  - HUs with any text/email usage (overall and by RO)
  - Texts/emails with a specified purpose option
- For CPS only, compute FR-level and HU-level percentages by interview number (1 thru 8)

*Analysis excludes FRs/HUs that were assigned to CAPI but did not have any CHI records
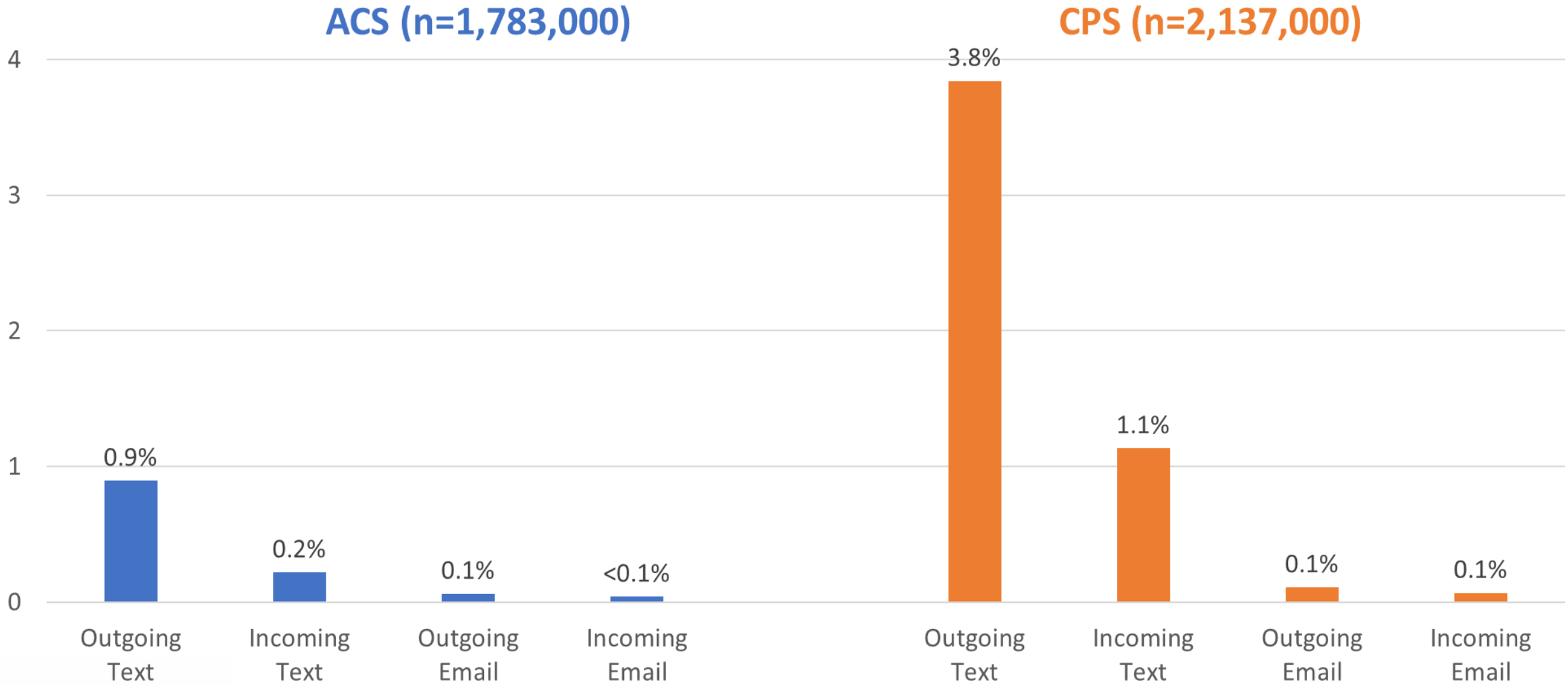
# Limitations

- Completeness of CHI records
  - Some FRs may not record every contact attempt
  - Training on capturing text/email in CHI may vary by survey or RO
  - Text/email differs from personal visit/telephone since "threads" and gaps in time between messages may be confusing for what to capture in CHI
  - Text attempts may also be confounded with telephone contacts since both rely on phone numbers

# Analysis 1 – Overall CHI Text/Email Contacts

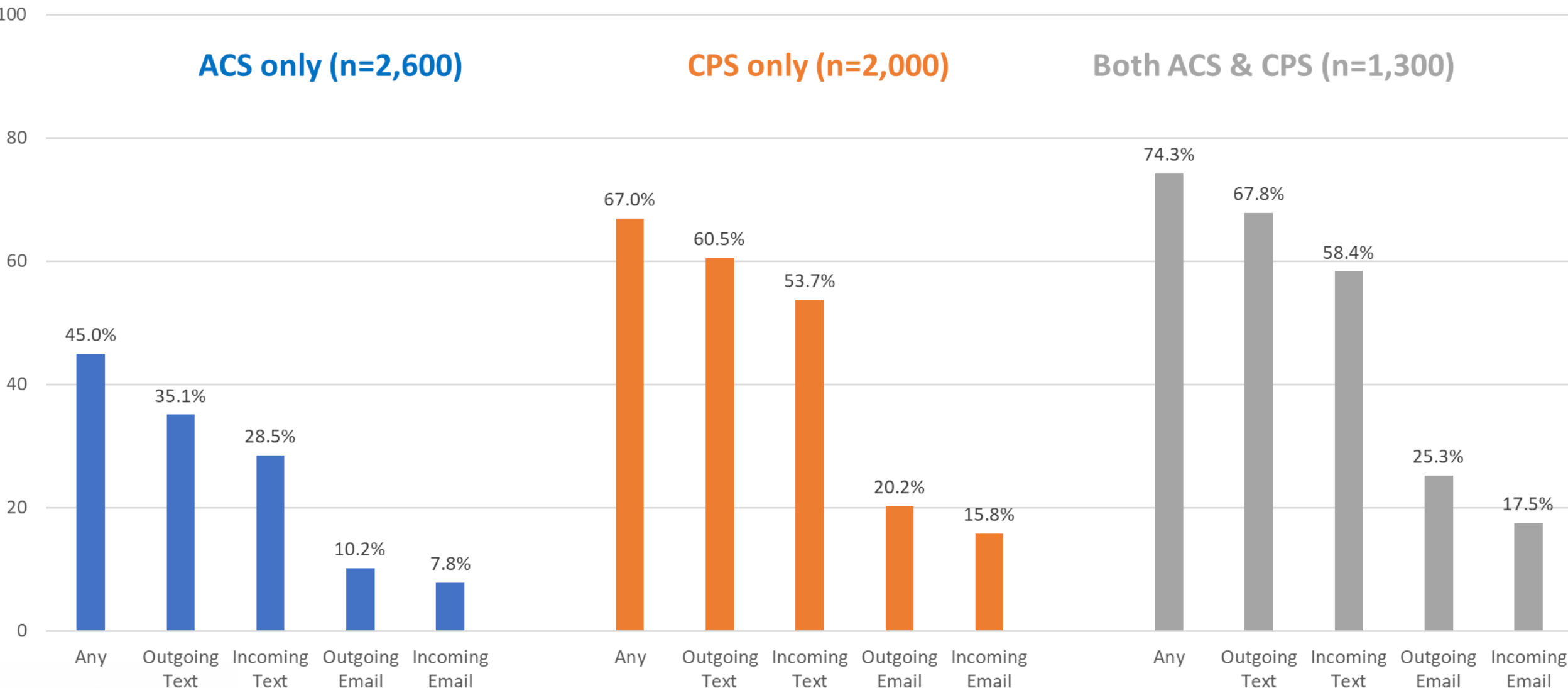# Distribution of All CHI Contact Attempts, by Survey and Mode



ACS (n=1,783,000): Personal visit 65.8%, Telephone 33.0%, Text/Email 1.2%

CPS (n=2,137,000): Personal visit 35.0%, Telephone 59.9%, Text/Email 5.2%

Legend: ■ Personal visit ■ Telephone ■ Text/Email

# Percent of All CHI Contact Attempts, by Survey and Mode (Text/Email Only)



ACS (n=1,783,000)

CPS (n=2,137,000)

| | ACS | | | | CPS | | | |
|---|---|---|---|---|---|---|---|---|
| | Outgoing Text | Incoming Text | Outgoing Email | Incoming Email | Outgoing Text | Incoming Text | Outgoing Email | Incoming Email |
| Percent | 0.9% | 0.2% | 0.1% | <0.1% | 3.8% | 1.1% | 0.1% | 0.1% |

# Analysis 2 – FRs with CHI Text/Email Contacts

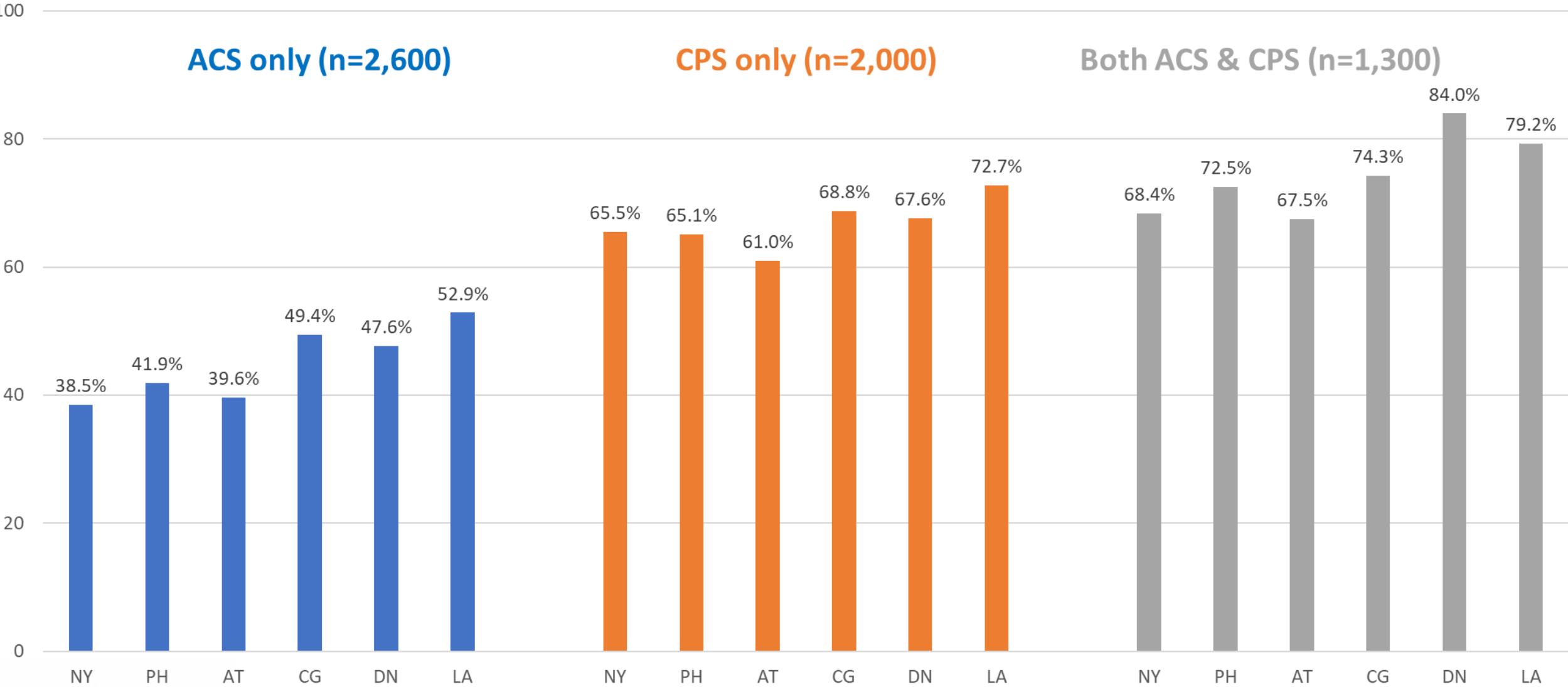# Percent of FRs with CHI Text/Email Contact Attempts, by Survey and Mode



**ACS only (n=2,600)**

- Any: 45.0%
- Outgoing Text: 35.1%
- Incoming Text: 28.5%
- Outgoing Email: 10.2%
- Incoming Email: 7.8%

**CPS only (n=2,000)**

- Any: 67.0%
- Outgoing Text: 60.5%
- Incoming Text: 53.7%
- Outgoing Email: 20.2%
- Incoming Email: 15.8%

**Both ACS & CPS (n=1,300)**

- Any: 74.3%
- Outgoing Text: 67.8%
- Incoming Text: 58.4%
- Outgoing Email: 25.3%
- Incoming Email: 17.5%

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Percent of FRs with CHI Text/Email Contact Attempts, by Survey and RO

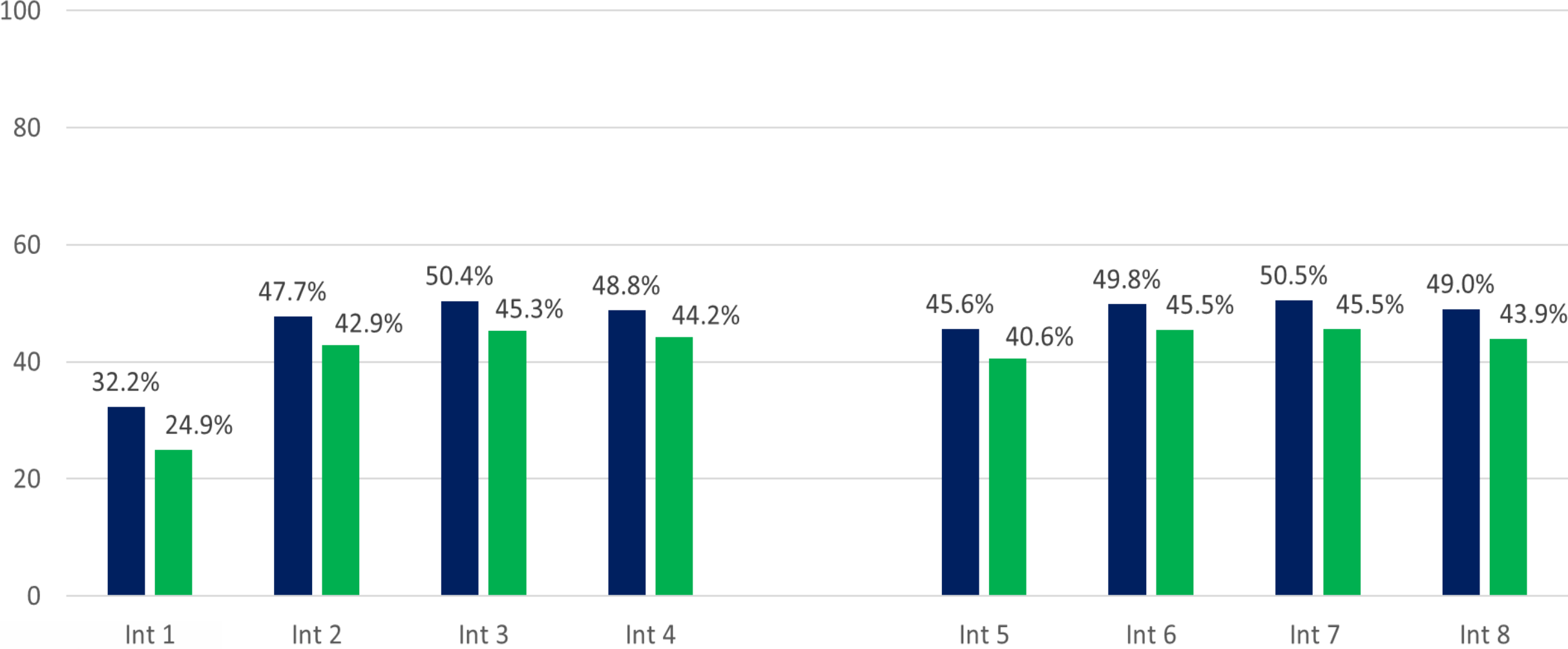# Percent of CPS FRs with CHI Text/Email Contact Attempts, by Interview Number and Mode (n=3,300)



Legend: ■ Any  ■ Outgoing Text

| Interview | Any | Outgoing Text |
|-----------|-----|---------------|
| Int 1 | 32.2% | 24.9% |
| Int 2 | 47.7% | 42.9% |
| Int 3 | 50.4% | 45.3% |
| Int 4 | 48.8% | 44.2% |
| Int 5 | 45.6% | 40.6% |
| Int 6 | 49.8% | 45.5% |
| Int 7 | 50.5% | 45.5% |
| Int 8 | 49.0% | 43.9% |

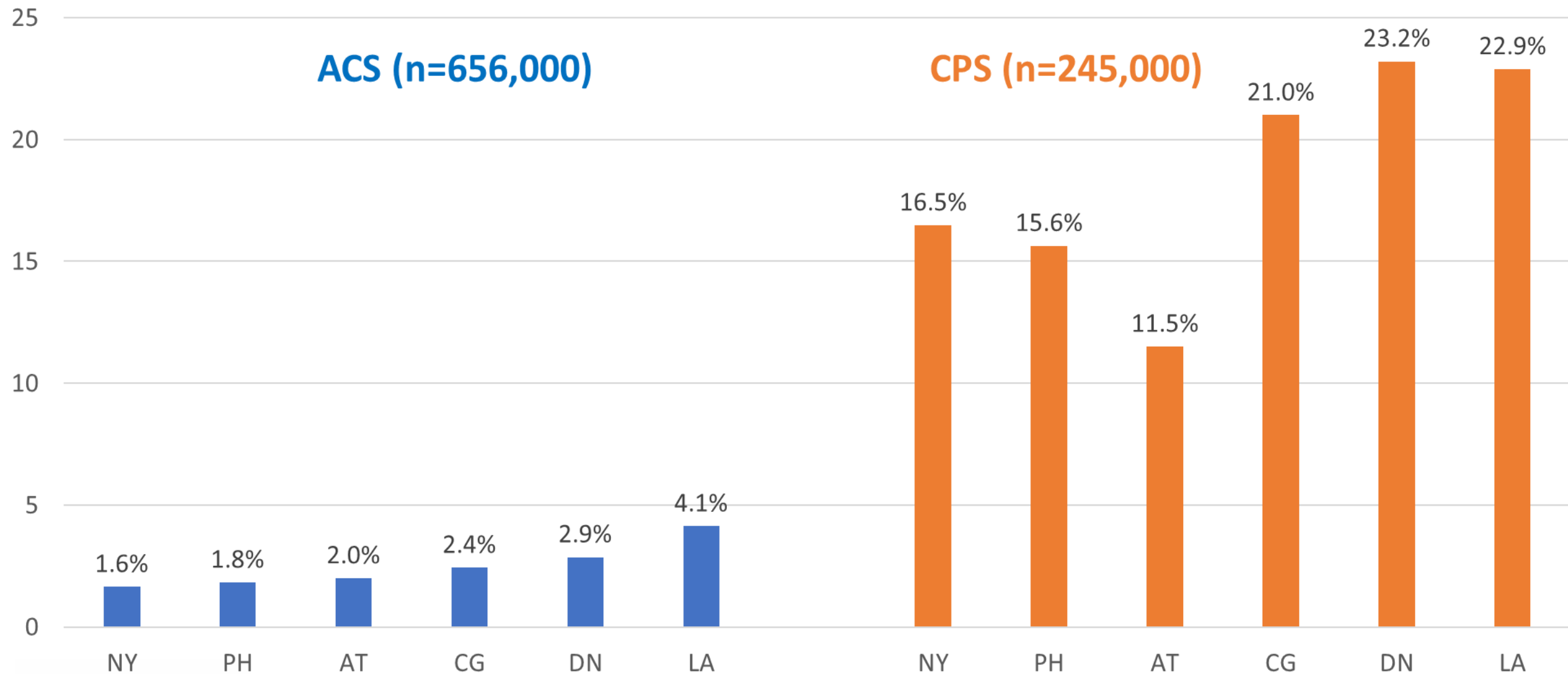# Analysis 3 – CHI Text/Email Contacts by HU

# Percent of HUs with CHI Text/Email Contact Attempts, by Survey and Mode



ACS (n=656,000)
- Any: 2.5%
- Outgoing Text: 1.9%
- Incoming Text: 0.5%
- Outgoing Email: 0.2%
- Incoming Email: 0.1%

CPS (n=245,000)
- Any: 18.6%
- Outgoing Text: 16.3%
- Incoming Text: 6.5%
- Outgoing Email: 0.7%
- Incoming Email: 0.5%

# Percent of HUs with CHI Text/Email Contact Attempts, by Survey and RO



**ACS (n=656,000)** — NY 1.6%, PH 1.8%, AT 2.0%, CG 2.4%, DN 2.9%, LA 4.1%

**CPS (n=245,000)** — NY 16.5%, PH 15.6%, AT 11.5%, CG 21.0%, DN 23.2%, LA 22.9%

Percent of CPS HUs with CHI Text/Email Contacts Attempts, by Interview Number and Mode (n=245,000)
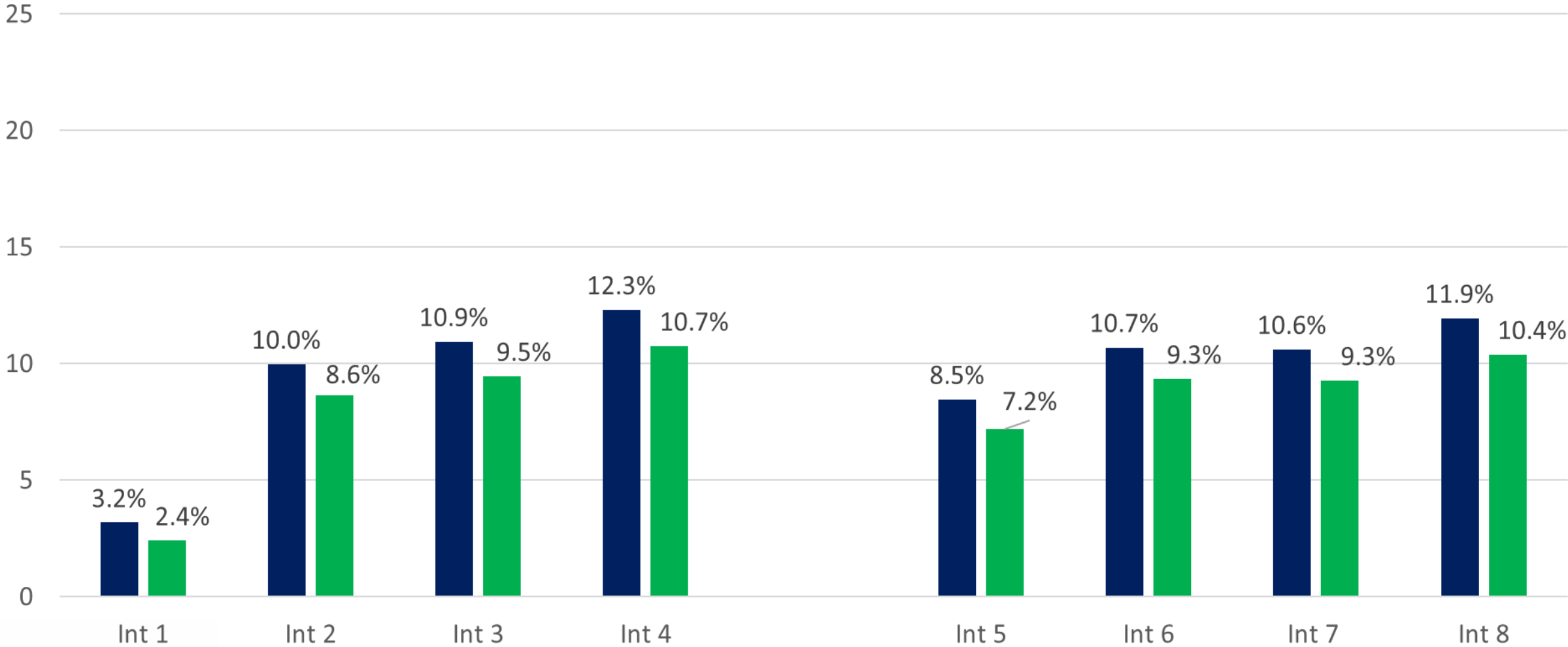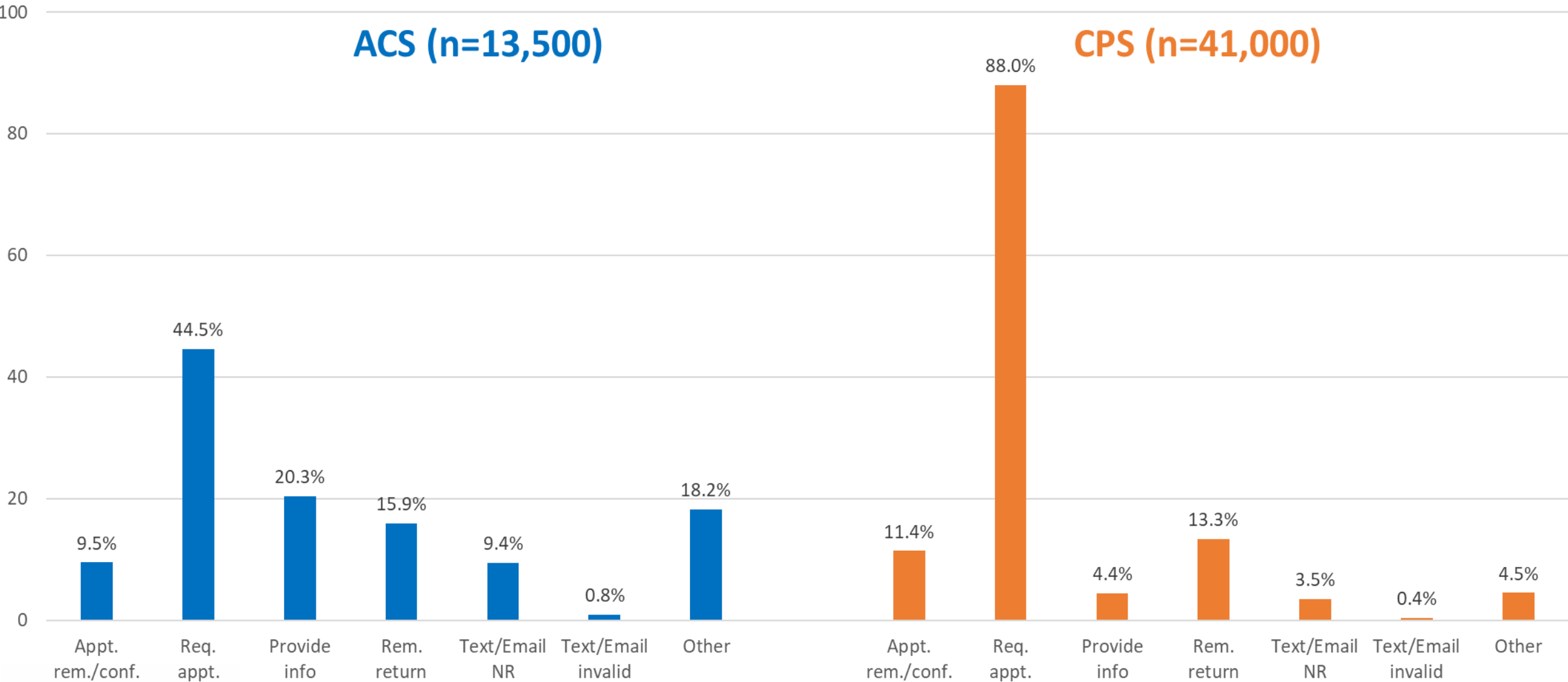
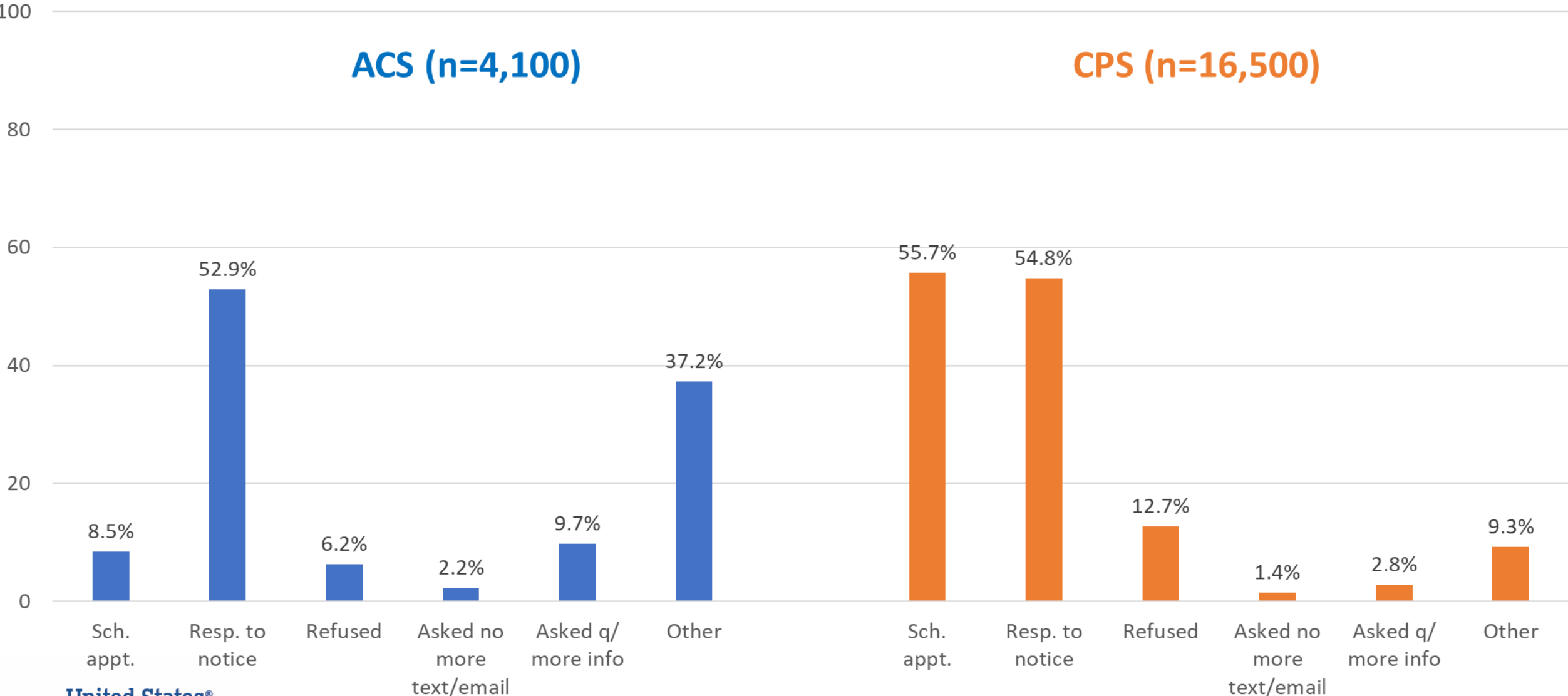# Analysis 4 – CHI Text/Email Contacts' Reported Purpose

# Distribution of HU-Level Outgoing Text/Email Purpose, by Survey

ACS (n=13,500)  CPS (n=41,000)

*Percentages add to more than 100, since CHI screen was "Select all that apply" and HUs may have had multiple CHI texts/emails.

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# Distribution of HU-Level Incoming Text/Email Purpose, by Survey



*Percentages add to more than 100, since CHI screen was "Select all that apply" and HUs may have had multiple CHI texts/emails.

# Conclusions (1)

- Texts and emails make up a low percentage of all contact attempts in CHI
  - 1% in ACS, 5% in CPS
  - Most are outgoing texts, least are emails
- Usage varies between ROs
  - More common among FRs and HUs covered by Western ROs (Los Angeles, Denver, Chicago) than Eastern ROs (New York, Philadelphia, Atlanta)
  - Unclear how much is driven by differences in training, culture, geographic types, or other factors

# Conclusions (2)

- Text/email usage more common in CPS than ACS
  - Likely driven by CPS longitudinal design, with higher usage after the first interview

- Text/email reported purpose varies by survey
  - CPS-recorded outgoing contacts mostly to request appts (88%), but ACS-recorded outgoing contact purpose varies more
  - Both surveys have a majority of recorded incoming contacts as responses to a prior notice (55% in CPS, 53% in ACS)
  - CPS-recorded incoming contacts also mainly to schedule appts (56%), but more varied in ACS (37% "Other")

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