



Innovative Retention Methods in Panel Research:

Can Smartphones Improve Long-term Panel Participation?

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Happy Spring!



Agenda

- Panels and Panel Management for Longitudinal Research
- Leverage Technology to Support Panelist Retention
 - Can tech innovation increase retention or is it necessary to maintain former levels?
- Panel Recruitment
- Panel Attrition
 - Threats to data quality
- Panel Retention Tactics
 - Traditional
 - Alternative

Agenda - continued

- ICF Experiment
 - Our panel
 - Treatment groups
 - Analysis and data usage
 - Next steps

Panel Creation Best Practices

- Panel studies - where the same individuals or households are interviewed at multiple points in time
 - Provides additional depth for low incidence studies, track behavior and other attributes over time
- Selection
 - Recruit from a probability-based statistically valid sampling method
 - Address Based Sampling (ABS)
 - Dual Frame RDD
- Consent and purpose (engagement/buy-in)
- Contact information for follow-up and tracking
 - Mail,
 - Phone(s), Email,
 - Relatives/friends/neighbor contact information

Panel Creation Best Practices - continued

- Establish expectations
 - Respondent burden (type, length of interview)
 - Duration of panel commitment (if known)
 - Importance of continued participation and engagement to validity and reliability of study results
 - Remuneration
 - Other non-financial benefits to respondents – passion about subject, altruism
 - Frequency of contacts
 - How sponsor will maintain regular contact with participants
 - request notification of changes in contact information
 - Improve/increase engagement - provide non-biasing updates and other information about study

Panel Attrition

- Why it's bad and why retention is important
 - can bias sample
 - can reduce statistical power
 - can be costly to replace panelists
- Industry rates of panel attrition
 - Literature search revealed published annual continued participation rates as high as 99% to as low as 50%¹

¹Una Lee, Center for Social Science Research, Panel Attrition in Survey Data, September 2003

Panel Attrition - continued

- Factors in attrition that researchers can control (somewhat)
 - Losing contact with panelists
 - Refusal to continue



Attrition Mitigation Tactics

- Traditional methods
 - Managing contact information
 - Good rapport
 - Participant-oriented actions²
 - Calls, visits, mailings
- New/alternative methods
 - Electronic information searches
 - Locate “lost” panelists
 - Smartphone app to maintain contact information

²http://www.wpic.pitt.edu/research/famhist/PDF_Articles/Springer/RI%206.pdf

ICF Experiment

ICF Panel

- Panelists recruited from survey of boat owners
- Demographics
 - State
 - Boat type
- Contacted quarterly to report about boating activities

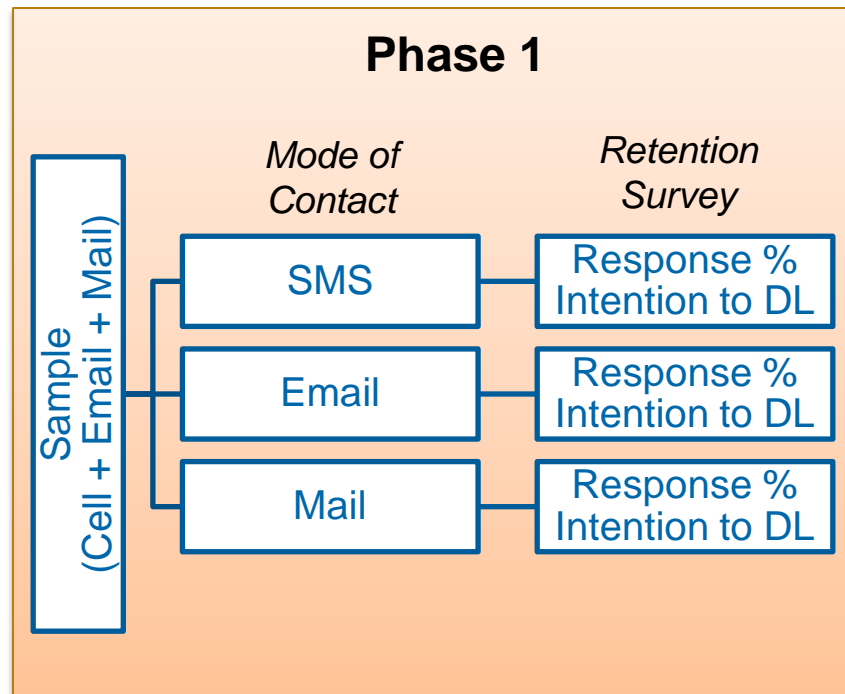
ICF Experiment - continued

- 3 Treatment Groups
 - Mail
 - SMS text
 - Email

ICF Experiment - continued

- Objectives
 - How best to manage panel over time
 - Keep pace with emerging technologies / public's evolving use of technology
 - Which mode evokes greatest response?
 - To what extent can stated intentions predict future behavior?

ICF Experiment - continued



- Phase 1—mini survey
 - Confirm smartphone ownership
 - Collect willingness to download app for further panel engagement
 - Collect preferred mode of future correspondence
 - Confirm/update contact information

ICF Experiment - continued

Phase 1 Survey (1 of 4)



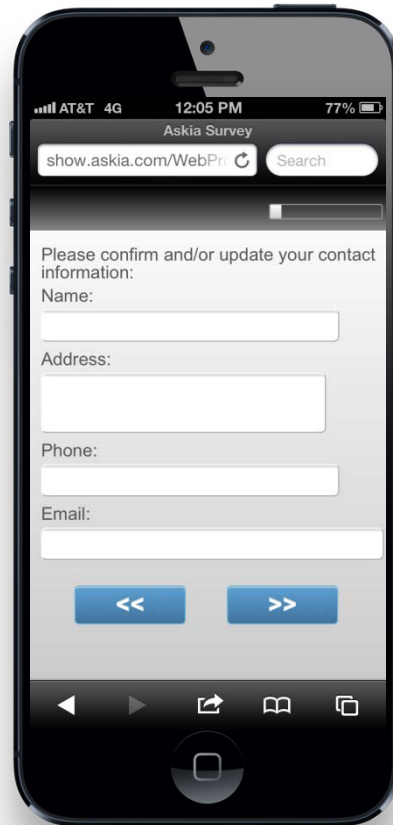
ICF Experiment - continued

Phase 1 Survey (2 of 4)



ICF Experiment - continued

Phase 1 Survey (3 of 4)



ICF Experiment - continued

Phase 1 Survey (4 of 4)

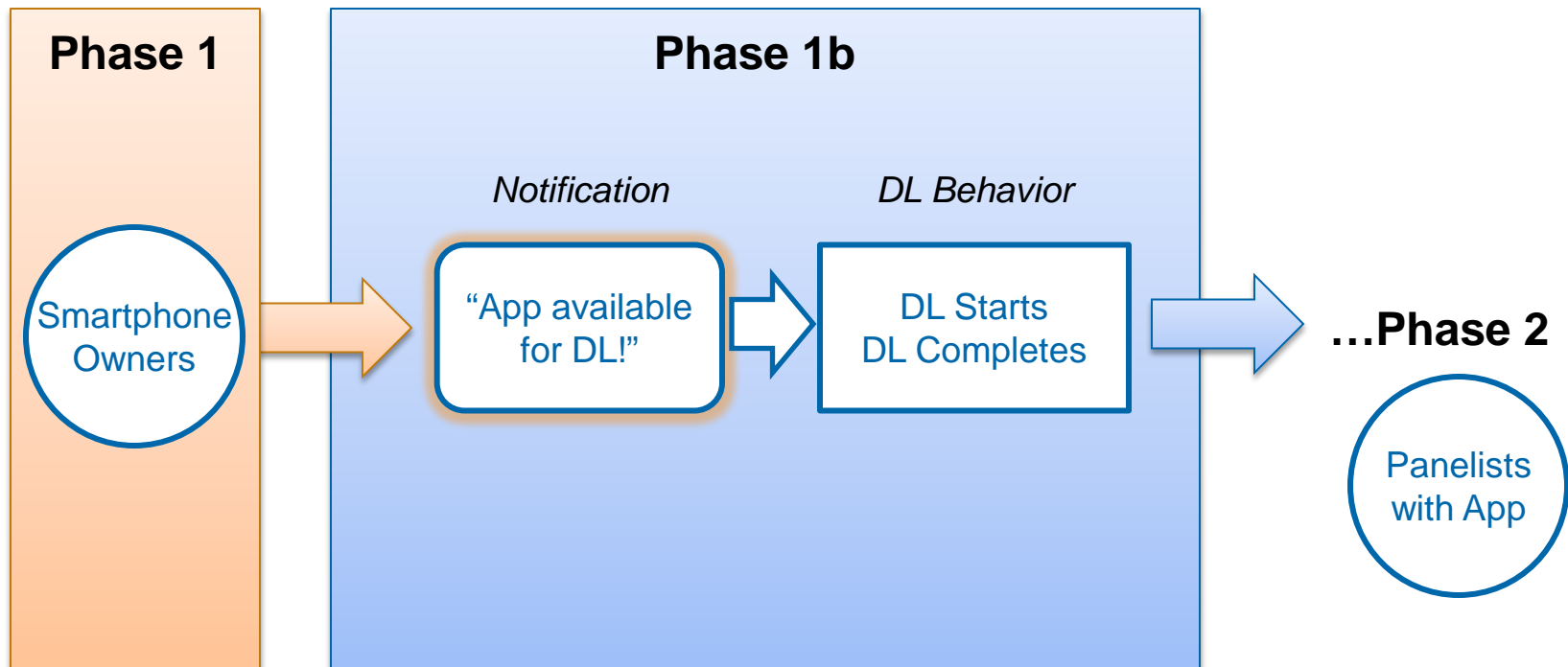


ICF Experiment - continued

■ Phase 1 Questions

- Does mode of contact influence response rates to a retention survey? (experimental)
- Does mode of contact influence participation in a future round of a panel survey? (experimental)
- Does mode of contact influence preferred mode of future correspondence? (experimental)
- Does mode of contact influence intent to download an app for future participation? (experimental)

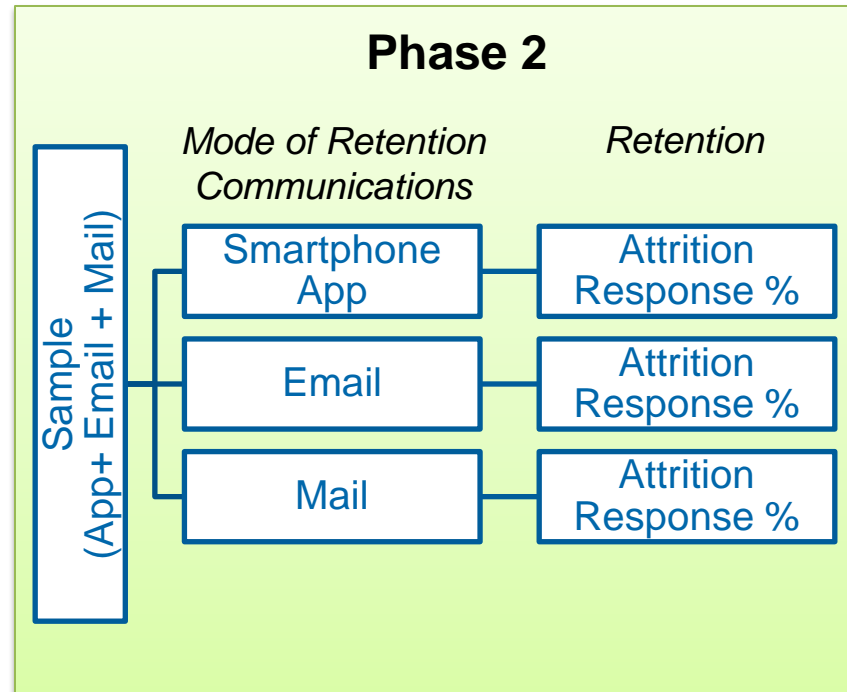
ICF Experiment - continued



■ Phase 1b Questions

- Does intention to download an app predict actual behavior? (correlational)
- Does download rate vary by Phase 1 mode of contact? (experimental)

ICF Experiment - continued



■ Phase 2 Questions

- Does mode of retention communications influence attrition? (experimental)
- Does mode of retention communications influence survey response rates? (experimental)

Analysis

- Preferred mode for future contact
- Preferred mode for future data collection requests
- Willingness to download app (started and completed)
- Confirmation of downloaded app
- Impact of mode of retention communications on attrition/response %

Next Steps

- Collect data using a SmartPhone Application
 - Survey notification, other Reminders/Alerts
 - Survey data collection (on or off-line)
 - Other uses – ‘newsletters’, contact information updates, games, etc.
- Does use of the App require too much respondent engagement/commitment?
 - Compare success of App data collection to Web data collection using SmartPhones

Next Steps - Continued

- Compare SmartPhone retention rates to more traditional panel retention rates
- Measure cost impacts of SmartPhone tactics vs. traditional panel retention tactics
- Experiment with making the App more useful/interesting
 - Multimedia – audio/video/pictures
 - Games
 - Take full advantage of the mode
 - Capture pictures, audio, passive data collection (GPS)

Questions?

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