

Strategies to Recruit and Represent Low Incidence Population Groups and Engender Sample Diversity in a Probability Panel

2022 FCSM Research & Policy Conference

Session B-6: Leveraging Probability Panels for Federally Sponsored Statistical Data Collections

David Dutwin, SVP, NORC

Ipek Bilgen, Sr. Research Methodologist, NORC



Federal surveys have a “higher calling” which includes deep representativeness

- Particularly today, a focus on diversity in surveys means sample and consequently respondent diversity
- Particularly today, a focus on equity in surveys means:
 - Ensuring that all persons are equally able to participate
 - Ensuring that our survey designs encourage as many people, equally and equitably as possible, to, in fact, participate
- This study serves as a case study in this regard: how the AmeriSpeak panel has made substantial efforts toward sample and panelist diversity and equity
 - What have we done with regard to sampling?
 - Special efforts to increase Spanish speakers, AANHPI
 - Impact of a new “equitable” design of recruiting materials.
 - Efforts to engage respondents we fear may disengage

Big Data to find hard to recruit
populations



Big Data Classifying

Predicting ahead of time whether a household has a person who is “x” (young, poor, Spanish speaking, smokes, etc.)

Potential Utility:

- To develop indicators far more effective than sample appends/vendor flags and/or geographic targeting.
- Significantly higher incidence = lower survey costs.
- Significantly higher coverage = lower weighting variances.

Anything can be modelled so long as there is an available training dataset with self-reporting on the variable of interest, address, and some indicator of respondent (name, or demo combinations like gender + age).

Models will vary in effectiveness: many explain more than half of indicator variance, but others have not been shown to be effective.

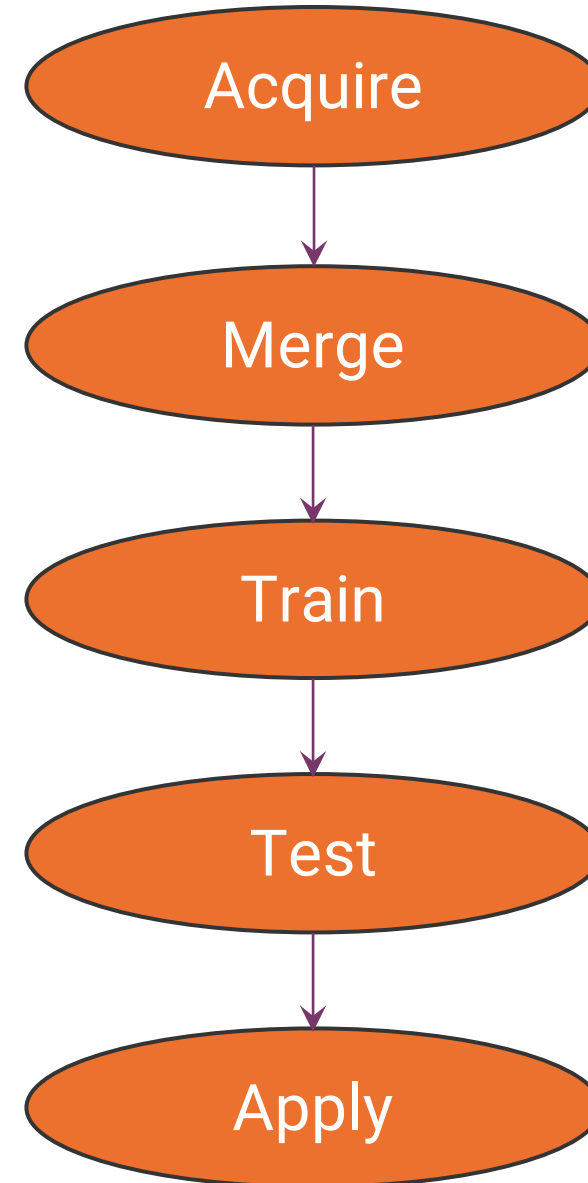
What Big Data?

There are a range of Big Data available, and at differing levels of measurement:

- **Governmental data** including Census Planning Database, the ACS, data from FEMA, the EPA, etc.
- **Voter Registration data**
- **Consumer data:**
 - Financial data:
 - Investment activities
 - Credit statistics
 - Personal finances and spending
 - Lifestyle indicators (hobbies)
 - Automobile purchases
 - Channel indicators (media use, subscriptions, etc)
 - Housing/Real estate data
 - Demographics
 - Travel
 - Sports use/interest
 - Music interests
 - Retail transactional data
 - Health indicators
 - Social media use

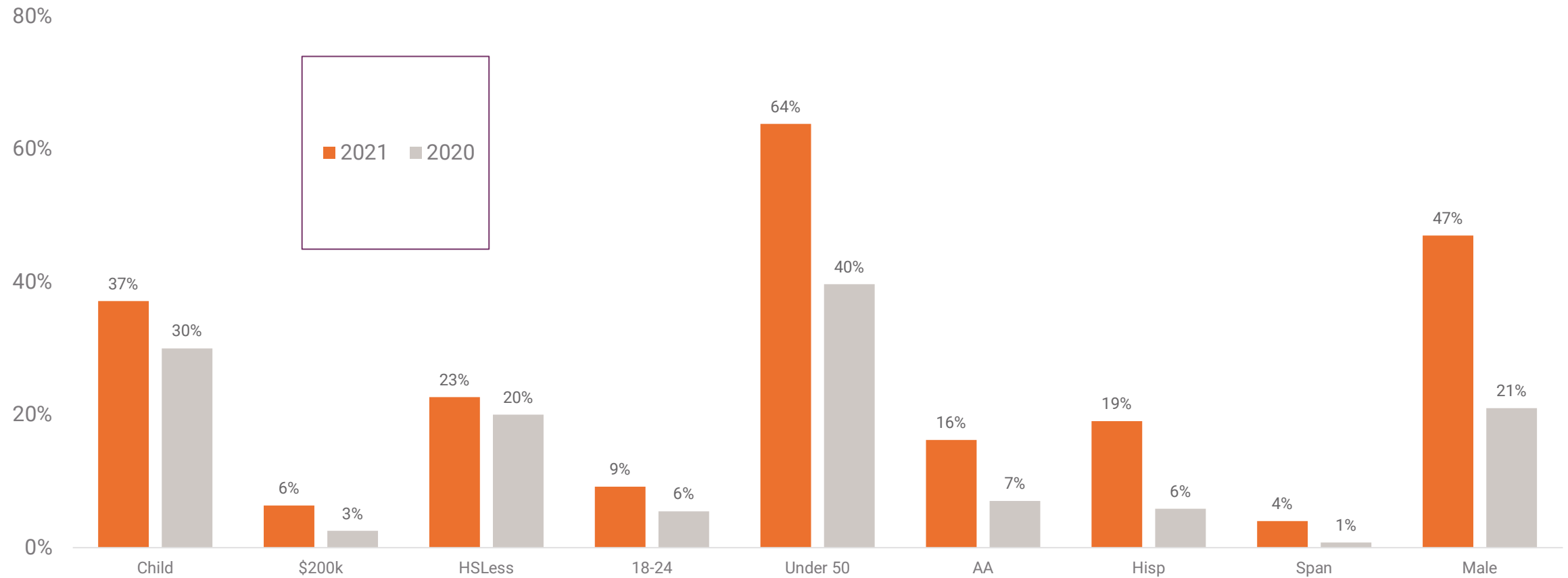
Process

- **Acquire and Match** Big Data
- **Merge** onto a large, high-quality survey
- Apply Data Science to **Train** a model
- **Test** the model
- **Apply (Score)** to a survey project



Impact of Big Data Classifier Sample Stratification on Recruiting

2021 Results w/ Big Data Sampling vs. 2020 Recruits



Increasing Spanish Language



The Challenge of Spanish Language

In short, you can target such households with Big Data classifiers, but they still may not choose to join as a Spanish speaker:

- Multiple studies find that Spanish speakers participate less, and when they do, they often strive to complete in English (for ex: CHIS 2019).
- Added 2,000 addresses identified as having the highest likelihood of containing Spanish speaking residents.
- Specifically in CA (LA, Fresno, San Diego, Modesto areas), TX (Houston, Dallas), FL (Miami, Orlando), NY (New York), and IL (Chicago) (approx. 60% of predicted Spanish speakers nationwide)
- Sent a 2-day FedEx packet followed by in-person visits in the fall of 2021. Hired 20 additional Bilingual field interviewers (~50 in total)
- An average of 2.5 visits were made to each household

Spanish Dominant FedEx Packet Brochure:

¿QUIÉN LE PIDE A AMERISPEAK QUE HAGA ESTAS ENCUESTAS?

Organizaciones que intentan mejorar la vida de los estadounidenses, tales como:

- Alianza Nacional para la Salud de los Hispanos
- Cruz Roja Americana
- NASA

¿POR QUÉ DEBERÍA UNIRME A AMERISPEAK?

- Valoramos mucho las opiniones de los estadounidenses que hablan español
- Su hogar representa a su comunidad
- Será premiado por compartir su opinión
- Usted informa las políticas y las decisiones de negocios



¿Qué es NORC en la Universidad de Chicago?

NORC en la Universidad de Chicago es una de las organizaciones de investigación más respetada, objetiva y no partidista del mundo. NORC ha estado llevando a cabo estudios impactantes e imparciales durante más de ocho décadas. Hoy en día, nos asociamos con clientes gubernamentales, corporativos y sin fines de lucro de todo el mundo para estudiar temas relacionados con las tendencias sociales, la educación, el empleo, el desarrollo humano y las finanzas.

Do you speak English?

Participate and influence change in your community by joining AmeriSpeak®, the leading opinion-sharing platform in the United States. You will receive \$50 or more when you complete your first survey. Then, you can receive up to \$5 or more for each additional survey you take. **TO GET STARTED, PLEASE VISIT www.AmeriSpeak.org OR CALL US AT (800) 860-1178 AND USE YOUR UNIQUE PIN** (see enclosed letter).

55 E. Monroe St., 19th Floor, Chicago, IL 60603 | (800) 860-1178 | ajyula@AmeriSpeak.org
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AmeriSpeak App www.AmeriSpeak.org @AmeriSpeakSurveys

Incluya su número de identificación personal (PIN) en la carta adjunta - Eso nos ayudará a contestar sus preguntas de una manera más rápida



Danos tu **opinión**. Representa a tu comunidad.

¡SÉ LA VOZ



Expresa su opinión y represente a su comunidad. AmeriSpeak®, la plataforma líder de internet en los Estados Unidos. Cuando completan nuestras encuestas, sus miembros tienen la oportunidad de representar a sus comunidades, y ayudar a las organizaciones. Expresar su opinión es muy fácil. Puede hacerlo en línea o por teléfono.



Ejemplos de preguntas que será premiado por responder:

¿Con qué frecuencia cocinas recetas de comida Latinas?

¿Haces la mayor parte de tus compras en línea o en persona?

¿Confías en la comunidad científica?

En los últimos 12 meses, ¿has tenido problemas pagando las facturas médicas?

La mitad de los estadounidenses están a favor de los mandatos de vacunación en su lugar de trabajo.



Datos de AmeriSpeak citados en Telemundo y más

¿QUÉ HAGO COMO MIEMBRO DE AMERISPEAK?

- Complete encuestas en línea en <http://www.AmeriSpeak.org/ES> o por teléfono al (800) 860-1178
- Complete su primera encuesta con su PIN único y reciba al menos \$50
- Complete algunas encuestas cada mes por invitación por correo electrónico o teléfono y reciba hasta \$5 o más por cada encuesta
- Dure alrededor de 15 minutos por encuesta y será premiado más por encuestas que duren más tiempo

¿DE QUÉ SE TRATAN LAS ENCUESTAS DE AMERISPEAK?

- Eventos actuales
- Nuevos productos de consumo
- Tendencias sociales y políticas
- Su uso de la tecnología
- Salud, avances médicos y muchos otros temas

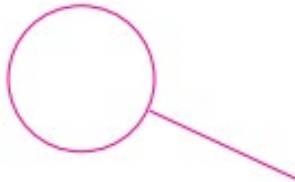
¿QUÉ TIPO DE INFORMACIÓN COLECCIONAN SOBRE MÍ?

- Nombre, dirección e información de contacto
- Detalles demográficos como: edad, etnicidad, nivel de educación
- Opiniones y valores sobre diversos temas
- También le preguntaremos si otros miembros de su hogar pueden unirse a AmeriSpeak

¿CÓMO OBTENGO MIS PREMIOS?

- Usted y cualquier persona de su hogar que se una recibirán AmeriPoints que pueden canjear por varias tarjetas de regalo como una tarjeta de regalo Mastercard o de Amazon.com
- Recibirá al menos \$50 en AmeriPoints por completar la primera encuesta, y hasta \$5 (5,000 AmeriPoints) o más por cada encuesta adicional que complete
- Usted sabrá el valor de los premios de cada encuesta antes de tomarlas (cada 1,000 AmeriPoints = \$1)

Bilingual/Spanish Leave Behinds: Door hangars, Sorry I Missed You cards, & other



SORRY WE MISSED YOU WHILE YOU WERE OUT!

Date:
Fecha:

To:
Para:

AmeriSpeak **NORC** at the University of Chicago

Hi,

I stopped by today to tell you about our invitation to join AmeriSpeak, and to provide any assistance you may need to get started and complete your first survey.

I invite you to join **today** to receive **\$50!** Then, you can receive more rewards every time you take a new survey.


To learn more about AmeriSpeak, visit us at www.AmeriSpeak.org or please call us at (800) 860-1178


SCRATCH OFF FOR YOUR PIN

RASPE PARA VER SU PIN


We look forward to hearing from you!

Sincerely:
Sinceramente:





¡LO SENTIMOS MUCHO NO HABERTE ENCONTRADO!



AmeriSpeak **NORC** at the University of Chicago

Hola,


Hoy pasé por su hogar para hablarle sobre nuestra invitación a unirse a AmeriSpeak, y ofrecerle asistencia para comenzar y completar su primera encuesta.

¡Está invitado/a a unirse **hoy** para recibir **\$50!** Luego, puede recibir más premios cada vez que complete una nueva encuesta.

Para más información sobre AmeriSpeak, por favor visítenos al www.AmeriSpeak.org/es o llámenos al (800) 860-1178 (con asistencia en Español)

En el reverso encontrará su PIN único

¡Esperamos escuchar de usted!



¡Por Favor Deme Una Llamada!

Mi nombre es _____, y soy su entrevistador de NORC. Lo/la estoy contactando sobre unirse al Panel de AmeriSpeak. Si tiene alguna pregunta, o le gustaría hacer un cita, puede ponerse en contacto conmigo directamente al: _____

Espero poder hablar con usted pronto. ¡Gracias!

AmeriSpeak **NORC** at the University of Chicago

¡Nos Gustaría Saber De Usted!

Si tiene preguntas sobre cómo unirse a AmeriSpeak, visítenos en línea en www.AmeriSpeak.org/es o llámenos gratis al (800) 860-1178.

Si desea confirmar mis credenciales o desea obtener más información sobre los protocolos de seguridad COVID, consulte este código QR o llame al Centro de Atención al Encuestado de NORC al (888) 856-6672.

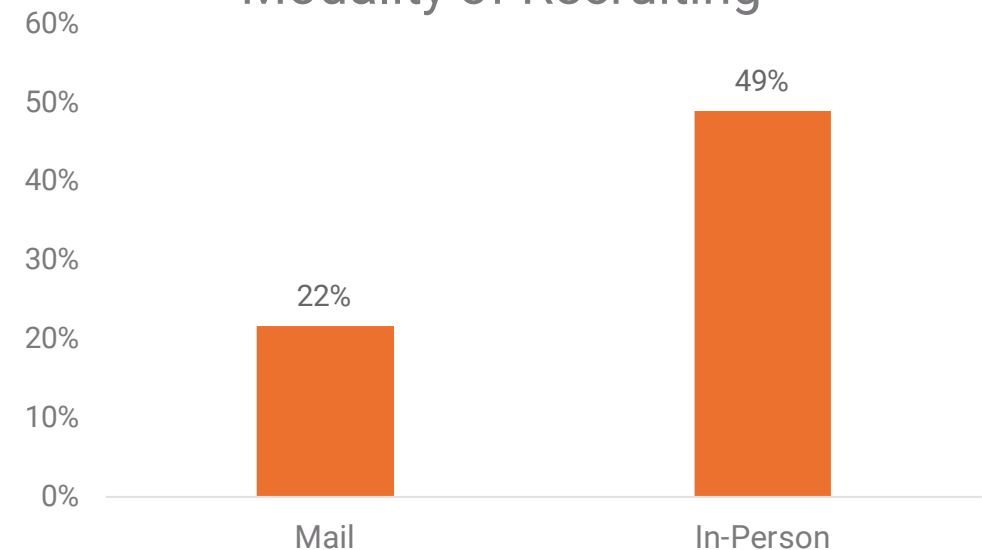


Buscar Protocolos de COVID para NORC

Results of Spanish Language Recruiting Sample 2021

Case Status	N	%
TOTAL	2,000	100%
Complete	432	22%
Hispanic	1,801	90%
Spanish: Fluent Read/Speak	1,702	84%
Spanish survey takers	980	49%

Percent Spanish Recruit w/in Spanish Big Data Classifier by Modality of Recruiting



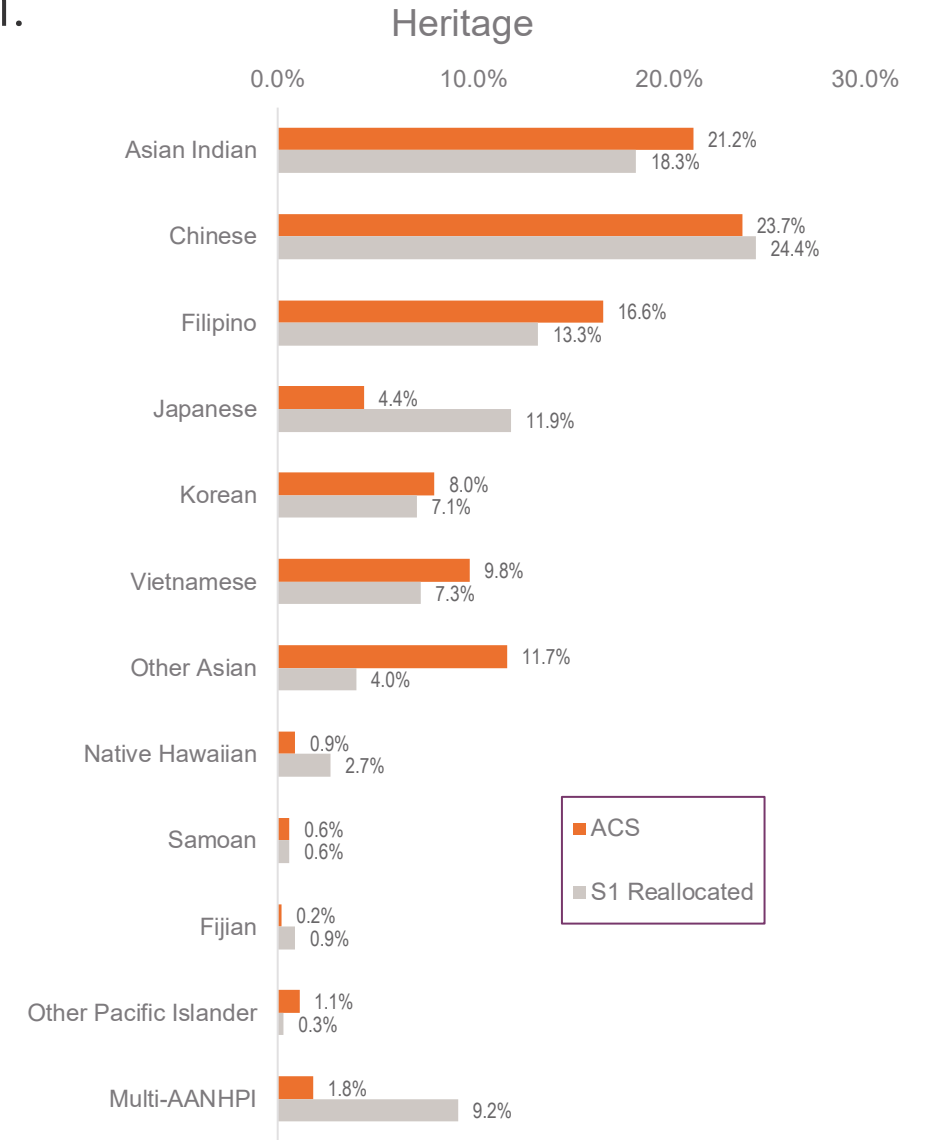
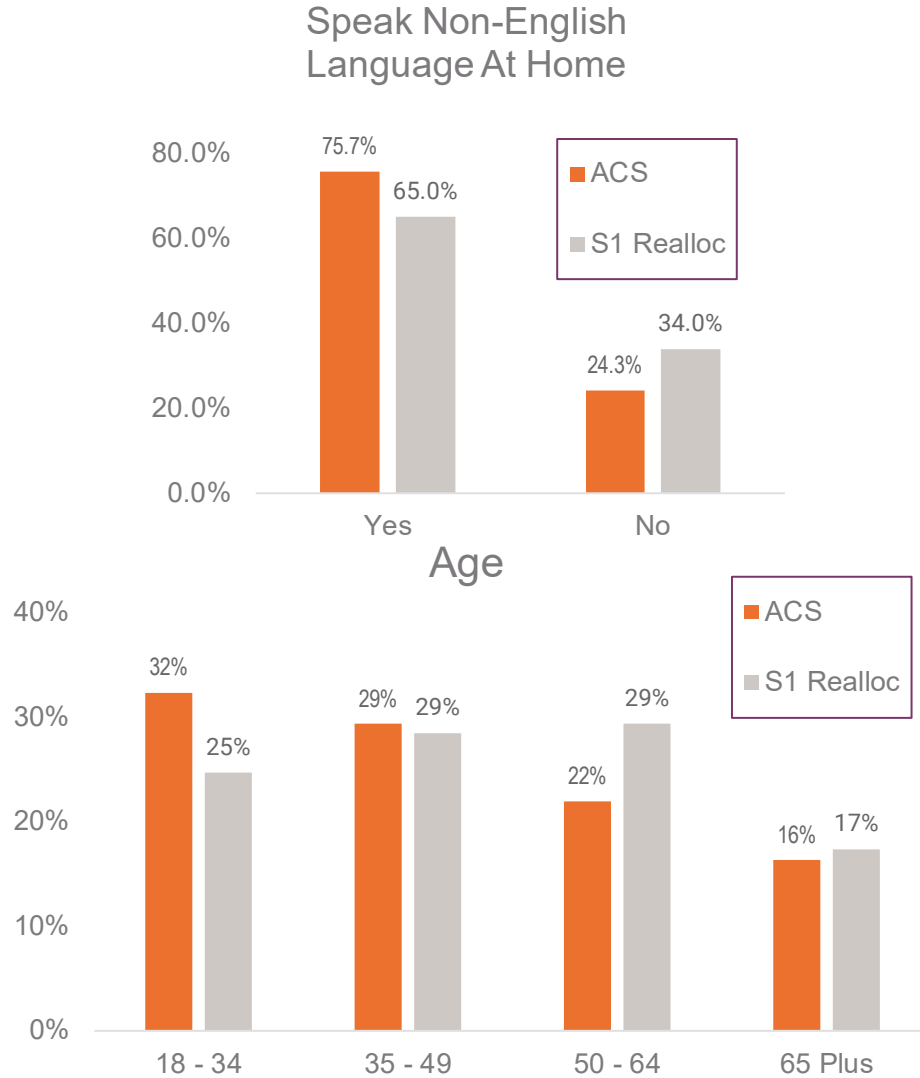
Increasing AANHPI



Turning AANHPI from “Other” to a Robustly Represented Group

- AmeriSpeak working with AARP and other major funders to build an AANHPI Panel that would supplement AmeriSpeak but also be able to support its own standalone surveys of the AANHPI population
- Aiming to support 1,000 panel interviews in early 2023 and 2,000 by end of 2023; 3,000 end of 2024.
- Pilot in 2022 resulted in 341 screened AANHPI interviews of which 292 agreed to future survey participation/empanelment
- Sample design leverages Big Data Classifiers + medium and high incidence CGBs.
- Multiple major funders already committed; continuing to seek additional funders to realize the full build

Largely representative of the AANHPI population:



Creating Equitable Materials



AmeriSpeak recognizes the need for equitable designs

- Most Americans don't read or speak like survey researchers do!
- Surveys historically fail getting at low education, young, and non-white respondents
- More currently, some concern with strong Republicans



Share your **opinion**. Represent your community.

Hello,

I'm Michael Dennis. Now, more than ever, we need a way for Americans to voice their opinions about the important issues that are facing them.

AmeriSpeak® is a panel of adults selected to represent all Americans by completing surveys and getting rewards. I invite you to join AmeriSpeak and be the voice of Americans just like you. Your opinions can help leaders make the best decisions about policies, programs, and products that impact your life.

We will mail you a packet with more information in a few days, but if you'd like to get started today, please follow the instructions on the other side of this postcard.

Join AmeriSpeak today!

Michael Dennis, PhD
Executive Director, AmeriSpeak



Hello,

Now, more than ever, we need a way for Americans to voice their opinions about the important issues that are facing them.

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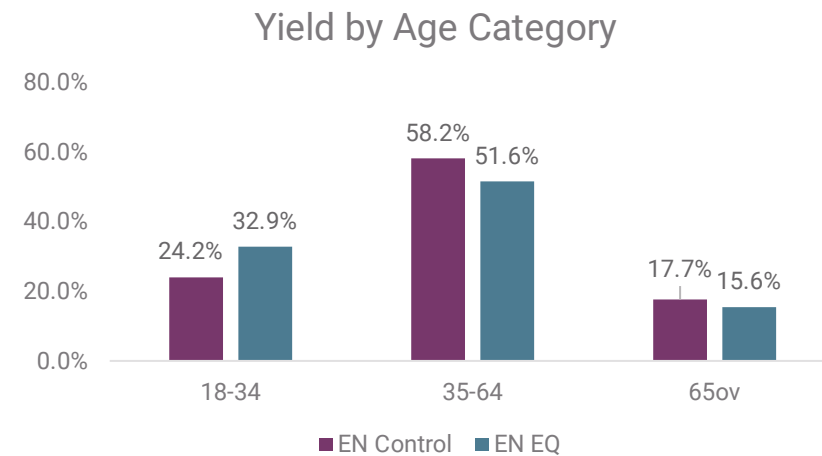
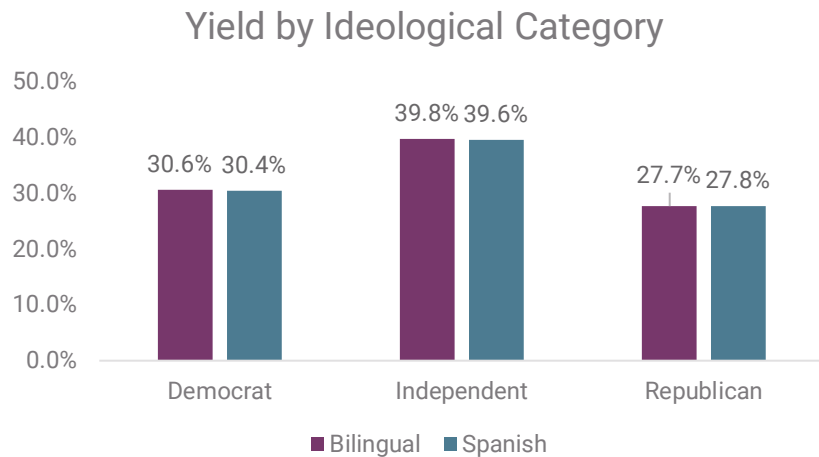
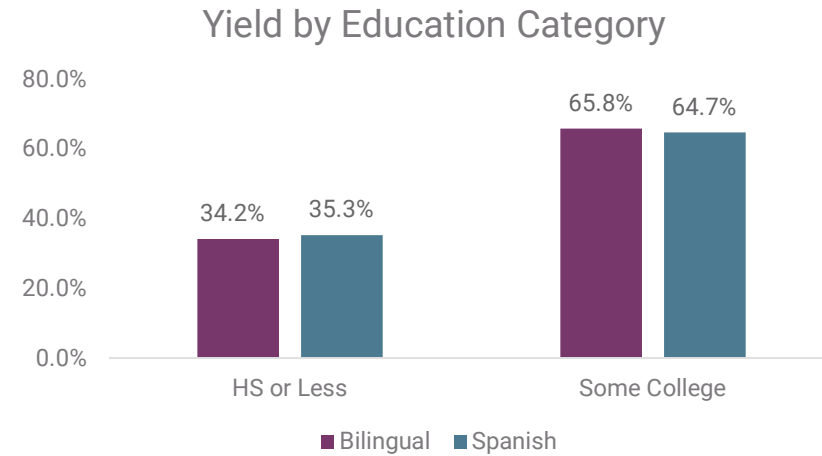
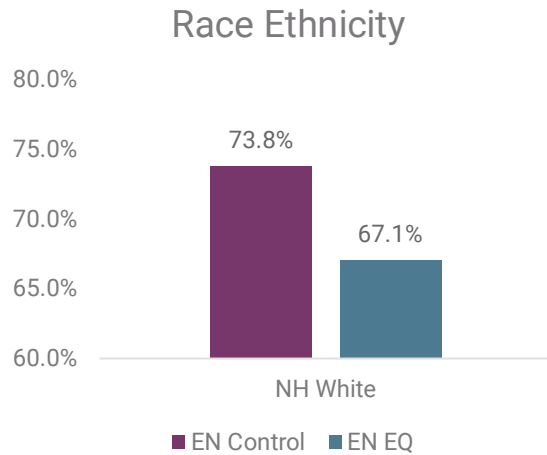
We will mail you a packet with more information in a few days. Please follow the instructions on the other side of this postcard to get started now.

Join AmeriSpeak today!

Michael Dennis, PhD
Executive Director, AmeriSpeak



Results: Improvements in race/ethnicity and age



Retention is Just as Important and
Recruitment



AmeriSpeak has made significant efforts to increase retainment and participation over time

- 1st 6 months are critical: 50% of attrition occurs at this time.
- Therefore, testing 1st 6th month mail and e-mail retainment communications
- Specific campaign to engage Hispanics, who attrit the most in the 1st 6th months
- Additional mailings
- Modelling future participation (see Stas!)

Questions?



Thank you.

Get Your Research Right

