Recruitment Techniques

Survey recruitment techniques are the methods practitioners use to collect a sample for survey research purposes. Each technique has strengths, weaknesses, and cost implications. This guide summarizes the most common methods to recruit participants to surveys of all kinds.

PURCHASED ONLINE PANEL

Data retrieval: Online

What is it? A purchased online panel is a sample of people who have opted to receive surveys via email. Individual members join panels through self-selection or are invited at random from the population through address-based sampling or similar methods. Panels are organized and maintained by marketing firms who sell access to their members by distributing survey invitations on behalf of researchers. Panel members are required to provide personal and sociodemographic details that are used to determine eligibility for surveys. Members are compensated with incentives or small amounts of money for each survey they complete.

How does it work? Firms charge the researcher a fee per completed survey. The fee depends on the study's incidence rate (IR), which is the portion of the sample population that is expected to qualify for the survey. Smaller groups of members (e.g., doctors, shippers, electric car owners) will have lower IR and higher per-complete costs, while larger groups (drivers, homeowners, 18+) have higher IR and cost less per completed survey.

What kinds of surveys does it work for? Purchased panels are a versatile recruitment methodology and are suitable for several survey types, especially surveys of the general population or studies that have specific eligibility requirements. Because panelists must submit detailed sociodemographic information to receive surveys, panel firms can let the researcher know how many members may be eligible before they administer the survey.

Pros: Purchased panels can help researchers collect data quickly and at a relatively low per-complete cost. Specific groups and harder-to-sample populations can also be targeted. For example, members can be selected to match a population by age, income, geography, etc. Panel firms can also let the researcher know exactly how many of its members are eligible to participate given qualification criteria.

Cons: Panels tend not to be representative of the population, skewing middle age and wealthier, with lower incidence of poorer, young adults and the elderly. Some providers recruit members using probability methods that can mitigate some of these issues; however, panel data are not considered representative without weighting and can be affected by response bias.

Costs: For surveys of the general population, per-complete survey costs are between $5 and $10. Costs can be much higher for studies aimed at lower IR members (e.g., truck drivers, recent airline travelers, electric car owners).

CONVENIENCE METHODS

Data retrieval: Online instrument | paper | phone

What is it? Convenience methods involve collecting survey responses from participants that are "conveniently" available to respond. Specific methods can include distribution of materials at a public meeting, email invitations to listservs of community groups, posts on social media platforms and websites, and posters or other printed collateral displayed in public spaces. It is the most common method of survey recruitment.

How does it work? Respondents are recruited opportunistically; convenience methods do not discriminate who can or cannot participate. For example, a project website could include an open link to an online questionnaire, or paper surveys could be left for public meeting attendees to take.

What kinds of surveys does it work for? Any study's data collection strategy can be augmented with convenience methods.

Pros: Simplicity of execution, relative speed, and low costs per complete. These methods can be a cost-effective way to conduct pilot studies, validate survey designs, collect anecdotal information, and complement other, more sophisticated data collection efforts. Convenience methods can also be helpful if public outreach and consultation is a goal. They can be an excellent way to integrate public input into planning and policy goals.

Cons: Nonrepresentative, high level of sampling error through selection bias. Studies that primarily use these recruitment methods can provide skewed results and are not regarded as statistically valid. However, studies using these methods can still be a useful means of getting input from the public or—if the budget is not available—to recruit from a more stringent sample.

Cost: Generally low. Costs can include materials or time to administer the survey (e.g., printing costs, website development hours).

MAIL-BASED INVITATIONS

Data retrieval: Online instrument 📶 | paper ☑ | phone 📞

What is it? Letters, postcards, and other collateral are distributed via the US Postal Service to residences, businesses, or other sample frames.

How does it work? Survey invitations and collateral are developed to distribute to potential respondents. Addresses are purchased through sample providers who maintain comprehensive lists of US addresses for residences, businesses, or consumers. Third-party printers then print collateral, merge addresses, postmark, and mail invitations. Response rates for a single mailing tend to be low (less than 2%), necessitating many thousands of invitations. Multistep strategies, including a reminder postcard in addition to an initial letter, increase response rates.

What kinds of surveys does it work for? Mail-based invitations can be tailored to provide representative coverage of the US residential and business populations and therefore is the best method available to collect large and representative samples, although like any survey, response bias (who responds to a survey) must still be addressed.

👍 **Pros:** This method supports careful curation of the sample to meet target geographic and demographic needs. This method allows broad reach and the best representation of the general population.

👎 **Cons:** Mail-based recruitment may be less effective at reaching younger, more technologically engaged populations, especially students or anyone without a year-round address. It is also inefficient for reaching hard-to-find respondents (e.g., transit users, those who bike to work). Further, the cost associated with mailers, including reminders and postage-paid response, can be high compared with per-completed survey costs of and online panel or email list. Some academic literature shows declining year-over-year rates of survey participation that use mail-based recruitment; however, surveys that are salient to the public interest with attractive and well-designed invitation materials can help boost response rates.

💲 **Cost:** Contingent on response rates. For transportation studies in Florida, response rates range from 0.5% to 2.5%. Costs include purchasing address sample, designing and printing invitations (e.g., postcards, letters, envelopes), and postage.

IN-FIELD INTERCEPTS

Data retrieval: Tablet computers 📱 | online 📶 | paper ☑ | phone 📞

What is it? This method employs trained data collection staff who both recruit participants and administer the survey on site. Occasionally, these methods provide survey invitation material to potential respondents or collect contact information for later completion of a survey.

How does it work? Data collection staff go into the field to recruit respondents. Field staff may then conduct an interview in person, using either a tablet computer or paper survey instrument. In some locations, staff may also provide the survey instrument to the respondent, which they may complete unassisted. Alternatively, field staff may provide invitations (e.g., postcard with survey URL/phone number) or collect contact information for potential respondents to complete a survey later. In-field intercept efforts may take days or even weeks to collect enough respondents and require careful planning and organization to select suitable sites and deploy field staff. For research where these methods are best suited (e.g., surveys of transit riders, airline passengers, or rest-stop users), access to survey sites requires securing permission from facility managers, which can require significant time and effort.

What kinds of surveys does it work for? Intercept surveys are most useful to gather data from targeted populations where no other outreach methods can efficiently collect data (e.g., transit origin-destination surveys, or airline travelers) or where there is value in public engagement, such as at high visibility events. Interview-based intercept surveys are also helpful for reaching respondents with lower technological engagement, or for collecting responses from otherwise difficult to reach populations (e.g., students or the elderly).

👍 **Pros:** Interviews yield high-quality data because staff can walk respondents through the survey. By controlling where researchers recruit respondents, staff can help ensure specific objectives are being met. Intercept surveys also may create a public sense that agencies are listening and accounting for customer sentiment or needs. Field interviews can collect high-quality data by minimizing respondent burden via on-site assistance to navigate the survey instrument.

👎 **Cons:** Intercept recruitment can be time-consuming and logistically challenging to organize. Field staff and technology rentals are a significant cost, particularly if conducting interview-based surveys over many days and weeks. While not necessarily more expensive than mail-based outreach, in-field efforts can become challenging to manage as the number of locations, days, and staff size increases. Risks to orderly data collection can also include staff shortages, instrument performance (e.g., internet for tablet), and other factors such as weather, transportation delays, technology failures, or other disruptive events that can uniquely affect this method.

💲 **Cost:** Costs can be comparable to a large-scale mail-based outreach but are contingent on response rates, length of outreach, and other factors. Costs include technology rentals, data collection staff labor, and efforts to organize and plan. Surveys conducted by specialized firms will often include professional staff to oversee on-site activities who may require hotels, meals, and flights. Extra upfront costs to professionally manage on-site efforts add cost but can greatly reduce the risk of a field effort going over on time or budget.

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Data retrieval: Phone

What is it? Computer-assisted telephone interviewing (CATI) surveys entail an interviewer who reads a questionnaire to the respondent over the phone and records their responses on a computer-based survey instrument.

How does it work? Phone-based interviews can be initiated by an inbound call from a respondent originally recruited elsewhere (e.g., a website, other advertisement, or email invitation) or an outbound call from the phone center. Outbound calls may be based on a specific call list or random-digit dialing (RDD) for a geographic area of interest. Interviewers follow the survey script laid out in the questionnaire and responses are recorded directly in the computer-based instrument, which saves responses to the survey database. Phone center efforts must be conducted by professional firms that maintain the technology infrastructure and staffing to place calls and collect data.

What kinds of surveys does it work for? CATI can work well for surveys where no other recruitment method is possible because RDD allows researchers to reach a wide sample. CATI can complement other recruitment modes such as intercept, mail-based invitations, or email-based recruitment where some respondents may prefer or require help from another person to complete the survey.

Pros: CATI interviews yield high-quality data because interviewers can walk respondents through the survey, clarifying questions in real team and ensuring responses are relevant. Phone-based interviews are also useful for reaching respondents with lower technological engagement or populations more likely to respond via phone (e.g., the elderly).

Cons: Phone-based recruitment may be less effective at reaching younger, more technologically engaged populations; cell-phone-only users also make this method more problematic, particularly with people moving to other regions but keeping their same cell phone number. Response rates for this method have rapidly declined in the last decade, increasing the time/cost and decreasing how representative the sample is. Also, with no visual prompt, questionnaire and script design must be concise and precise to avoid confusion. Telephone surveys cannot generally be used to collect origin-destination data or stated preference data.

Cost: Phone centers often charge by completed questionnaire or by the number of outbound calls. While it is possible to conduct simple phone surveys in a cost competitive manner, they are generally more expensive than online panels

Data retrieval: Online

What is it? Internet-based survey where recruits receive an email inviting them to participate in a survey.

How does it work? Researchers acquire email addresses through customer or constituent lists, (e.g., those who opted into market research or other agency correspondence). Researchers then send an email invitation that includes a link to the survey. The best practice is to send a unique survey link to each recruit, which allows the researcher to track completions, send reminder emails to those who have not yet completed the survey, and ensure respondents can resume any previously started survey. Researchers may send these emails individually through their own email service, but email management software (e.g., Mailchimp, Constant Contact) is preferred.

What kinds of surveys does it work for? Email recruitment generally works well for any survey where a viable email list that represents the study population is available and where invitations are distributed to the respondent from a trusted source. Examples where email outreach is most effective include outreach to customer lists (e.g., transponder owners or political donors), or cases where the target population has opted to receive emails.

Pros: This method can avoid many costs associated with other recruitment methods as it includes no printing, mailing, or additional outreach costs. Email recruitment also ensures that the online survey instrument can include complex questionnaire design difficult to conduct via other modes. Unique survey links permit detailed and real-time tracking of progress and easy follow-up helps ensure high response rates. Email list members can be contacted for reminders or follow-up research.

Cons: Email recruitment can be ineffective at reaching less technologically engaged respondents. Because there is less contact built in than with interview-based recruitment methods, it can be harder to establish how and where respondents may struggle to understand or answer certain questions. Distributing emails to third-party lists (i.e., recipients that have not granted explicit permission to be contacted) via email marketing platforms is generally not permitted and can violate terms of use. Emails from lists must often be sent by the entity or organization that collected the contacts and not by a third party conducting the research. Participation from email lists can be low; however, when recipients receive invitations from trusted or reputable sources, response rates can be significantly improved.

Cost: Where feasible, email lists can be among the most cost-effective methods for collecting survey data.

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