

Panel Recruitment for Spanish Speaking Populations: The AmeriSpeak Case Study

Ilana Ventura¹, Rene Bautista¹, David Gleicher¹,
Carolina Milesi¹, Erlina Hendarwan¹

¹NORC at the University of Chicago, 55 East Monroe, Suite 3100, Chicago, IL 60603

Abstract

Recruiting representative samples of the Hispanic and Latino population is challenging in the survey research environment in the United States. This paper discusses some of the initial challenges and proposed solutions in recruiting Spanish-speaking households for a probability-based panel. To improve recruitment materials, and as a consequence, the representativeness of the Spanish-speaking segment of NORC's AmeriSpeak® Panel, NORC performed a qualitative assessment of the AmeriSpeak Spanish-language panel recruitment materials, including in-depth interviews and focus groups, to identify adjustments to the panel recruitment protocol. This paper discusses our methodology for the qualitative study performed, findings, as well as our recommendations for improving the effectiveness of panel recruitment with Hispanic and Latino populations.

Key Words: in-depth interviews, focus groups, panel recruitment, material design, bilingual

1. Introduction

Recruiting Hispanic and Spanish speaking respondents in the United States for survey research is challenging. This paper reports findings from a series of qualitative focus groups and interviews that explored that connotations of various terms, issues, and themes for survey recruitment material. The goal of these focus groups and interviews was to improve printed recruitment materials for NORC's AmeriSpeak Panel, but the findings are likely to be applicable in other contexts having to do with recruitment and retention of Hispanic, Latino and Spanish-speaking populations.

AmeriSpeak is a nationally representative sample of U.S. adults, where households are selected randomly from NORC's National Sample Frame, which provides sample coverage for over 97 percent of U.S. households and includes additional coverage of hard-to-survey population segments, such as rural and low-income households. Recruitment is a two-stage process. For the initial recruitment, sample units are invited to join AmeriSpeak online by visiting the panel website or by telephone (in-bound/outbound supported). In the second stage, non-response follow-up is performed by way of Federal Express mailers, enhanced respondent incentives, and field interviewers using face-to-face contacts with non-responders. English and Spanish languages are supported for online, telephone, and in-person recruitment (Dennis, 2017).

Though recruitment for the NORC AmeriSpeak online Panel has been largely successful (for 2014-2016, AAPOR R3 (weighted) was 34%), NORC's AmeriSpeak is continuously working to improve its representation of the Latino population, in addition to the general U.S. population (Montgomery et.al, 2016). Thus, for the 2017 Panel recruitment, NORC and AmeriSpeak chose to oversample Hispanic and Spanish speaking segments of the U.S. population. To do so, the recruitment protocol and materials needed to be sensitive to cooperation barriers specific to the Hispanic and Spanish speaking populations, including but not limited to language, cultural and behavioral differences, and privacy concerns.

Market research has long been concerned about how to properly reach out to Hispanics. Market researchers have developed strategies to reach out to Hispanics with regard to advertisement (Burgos and Mobolade, 2011; Valdes, 2008), purchasing decisions (Murillo, 2015; Shagrin, 2008), and also digital media (Gevelber, 2014). These research has mostly documented that Hispanics require targeted marketing and are increasingly active on online and other digital platforms. They also emphasize the various segments of the Hispanic market that require a dynamic approach to outreach that is focused on themes central to Latino culture.

In order to explore themes and concepts that could be of use in making materials more appealing to Spanish-speaking respondents, we reviewed the literature on survey participation and persuasion and identified several concepts that affect cooperation and participation in general and for surveys in particular to better understand the communication process (Groves, 1989; Cialdini, 1984; Albaum & Smith, 2012).

The first of these concepts is reciprocation – The principle that some sort of gift or kindness prompts someone to give something back in return. In survey or panel recruitment, we seek the respondent's participation as reciprocation. Of note, the principle of reciprocation can backfire if it is too obvious - "if the subject perceives that the intent in providing the initial gift is to encourage the reciprocation" (Groves, 1989).

The second principle, which is closely related to the principle of reciprocation, is that of social exchange. This principle stipulates that "the actions of individuals are motivated by the anticipated relationship between the rewards and costs associated with these actions" (Albaum & Smith, 2012). In other words, a calculation of reward, cost, and level of trust is the deciding factor in deciding whether or not to participate in a survey request or panel recruitment. Of note, these rewards and costs can be economic or social. The perceived calculation of reward, cost, and level of trust gained from the recruitment material is an important factor in the respondent's decision to participate in a request. For the purposes of this investigation into the materials, these theories prompted us to ask: What kinds of economic or social rewards do these materials promise? What are the costs of participation in terms of time and effort or other hidden social costs that may give potential respondents a reason not to participate? Finally, do the materials give potential respondents reason to believe they are likely to receive whatever reward is promised?

A third principle considered was that of consistency – the tendency to want to keep behaviors and beliefs consistent with previously held behaviors or beliefs (Groves, 1989). If respondents can be convinced that panel participation is consistent with some prior behavior or previously held attitude, recruitment is more likely to be successful. Groves defines the social corollary of internal consistency as 'social proof' and states that we are likely to comply, or not comply, with a request depending on the actions of others whom we consider to be like ourselves. Additionally, if the request can be tailored to highlight some characteristic of the respondent that they consider to be unique or important, it will be more likely to be successful. People are more interested in responding to a survey

request if they feel they have something unique to contribute to the survey they may not easily be replaced by another respondent (Groves, 1989). This is an important aspect we keep in mind when tailoring our material to Hispanic and Latino respondents, and something we note in our qualitative work.

The next principle was that of authority – the principle that a request is more likely to be successful if there is a high level of legitimacy, power, or prestige, associated with the requestor. Roles and social context are of key importance, as notions of authority can vary greatly across cultural contexts. Existing recruitment materials appealed to NORC’s nonpartisan stance and its collaboration with various institutions, including, NORC’s affiliation with a prestigious university. Though this was effective enough with the general population, we were not sure how this particular sign of authority was being judged or understood by the Hispanic, Latino and Spanish-speaking communities receiving the AmeriSpeak recruitment materials.

The final principle, leverage-salience, states that interest in a topic is a key factor in willingness to participate. Prior recruitment materials contained assurances that topics on future surveys in the panel would be wide-ranging and engaging, but offered few specific examples of topics. We were interested in seeing how these assurances were evaluated and whether they were sufficient to satisfy the principle that questions and issues should be salient to respondents.

2. Research Question

In what specific ways can we improve recruitment materials to increase the effectiveness of our recruitment of Hispanic and Spanish-speaking respondents? We addressed this question by focusing on three elements: concepts, language and design.

With regard to concepts, we focus on the familiarity of Hispanic and Spanish speaking respondents with surveys and social science research, effective messages for recruitment, and effective strategies for integrating these findings into recruitment material messaging.

With regard to language, we focus on how to effectively translate materials from English to Spanish, while being particularly attentive to connotation.

With regard to design, we emphasize how to make the design of materials, and the messages that the designs convey, conducive to Hispanic and Latino respondent recruitment. One challenge was to do this while maintaining a consistent design for Spanish *and* English speaking respondents. We needed to find a design that was attractive to English speakers and Spanish speakers, since some printed materials would have to be bilingual, often with English on one side and Spanish on the other.

3. Methods

We use the principles of reciprocity, social exchange, consistency, authority, and leverage- salience to inform our exploration of concepts, language and design in the recruitment materials.

To do so, we first assess the state of the initial bilingual AmeriSpeak materials through two rounds of qualitative assessments. The first round of qualitative assessments comprised of three In-Depth Interviews (IDI’s) and one Focus Group (FG), in November of 2016. In

the first round of assessments, respondents were exposed to the existing initial bilingual AmeriSpeak materials that had been used through 2016. Based on these findings, we worked with a graphic designer to revise the bilingual materials, which included new concepts and new text that was theoretically and research based. Next, we performed a second round of qualitative assessments, comprised of three IDI's and one FG, in December of 2016. In the second round of assessments, revised bilingual materials were presented to respondents. Final revisions to bilingual materials were made based on the second round of qualitative findings.

4. Results

4.1 The Concept of “Surveys”

At the start of the first round of interviews (pre-redesign) and focus groups, researchers initiated a broad discussion on surveys, conceptually, to understand how respondents thought about surveys. The majority of respondents did not know what surveys were or how surveys, or social science research more broadly, applied to them. Some respondents indicated that they did not know enough about particular topics (such as politics) to express their opinions. Others indicated that they did not know what the survey process entailed. We observed that respondents easily confused surveys with marketing and were generally skeptical of the materials and wanted to know what AmeriSpeak was selling.

These findings indicated that the recruitment materials needed to more directly explain the intention of the communication, and what being a part of a survey panel really entailed. To explain the survey process and benefit, we included a graphic element in the abbreviated privacy policy document in the recruitment packet about the survey process, which linked respondents to their ability to make changes in companies and government by expressing their opinions. As survey researchers, this is obvious to us, but sometimes we forget that we need to convey this message to our respondents too. Further, we made the word “opinion” prominent in all the materials during revisions to ensure respondents knew that we wanted their opinions on various topics.

4.2 The Concept of “Community”

Initial materials asked respondents to *join the AmeriSpeak community*. While the concept of joining an online community of survey-takers made sense to our English speaking respondents, some Spanish speaking respondents did not understand how AmeriSpeak could become their community, as they were already part of a community, or several (such as a neighborhood, sport, church or on-line community). The notion of an online community was not foreign (such as groups on Facebook), but the concept of a community of survey takers was more problematic because, to our respondents, community entailed personal interaction, and a survey panel is not a place for interaction with other people.

Community, however, is an important concept for Latinos and Spanish Speakers. For the material redesign, we emphasized how AmeriSpeak allows respondents to represent their own community to companies and leaders in government. Most respondents indicated they would be less reticent to join a panel to represent their families and communities. We therefore recommend promoting the idea of representation of one's community as an example of a messaging strategy that works for the Hispanic population.

4.3 The Concept & Language of “Influence”

Initial materials used the tagline “Become an Influencer” to indicate to respondents that their participation was important. While in English, the concept of “Being an Influencer” is positive, we found that, uniformly, “Being an Influencer” has a negative connotation in Spanish and should therefore not be used. In Spanish, to be “an influencer” has the connotation of bribing others to gain power.

However, in Spanish, we found that the concept of “listening to you” or “being heard” was much more positively received. Our respondents were eager to have their opinions heard by government, institutions and companies, but the notion of “influencing” them was something we wanted to avoid.

4.4 Corporate vs. Casual Language

Several respondents indicated that the initial materials were too corporate in their look and content. Given respondents’ lack of understanding about the survey process, this was concerning, for respondents could not distinguish between materials that sought their cooperation for a social science survey and those that were obliquely selling them something or were not relevant to them. Some respondents felt as though the target audience was business executives, and not “ordinary” people like themselves. They expressed a desire for more streamlined, simple, and personal material content and design.

During revisions, language was simplified to be more casual. For example, the term “introductory survey,” or “encuesta introductoria” in Spanish, was found to be too complex for some respondents to comprehend comfortably. We therefore recommend using the phrase “First Survey,” or “Primera encuesta” in Spanish. Our second round of respondents preferred this new term.

Respondents generally preferred language in the informal “tu” form, however, did not mind when we switched from informal “tu” to formal “usted” within the materials if it made more sense in context to them. Further, the term “join,” or “unirse” in Spanish, was preferred over the term “register,” or “registrarse” in Spanish. This is because the former was perceived as more casual and the latter more corporate or bureaucratic—such as something official that one does at a state or federal agency.

Several respondents indicated that the use of “PIN” in Spanish was odd. Some felt as if it was a poor translation of the English. Others indicated that “PIN” reminded them more of a debit card and was strange in this context. After discussion in the focus group, the majority of respondents agreed that “contraseña” (password) would be a more appropriate term for the Spanish translation.

A respondent indicated that “at least \$20” was not a positive way to present the monetary incentive to participate in AmeriSpeak. The respondent suggested, and we agreed, that “\$20 or more” is a more positive language. Consequently, we propose that, the explanation of the reward respondents receive should read as “Get \$20 or more for your first survey,” or “Obtenga \$20 o más después de completar su primera encuesta” in Spanish.

Some respondents found the language “No costs, no fees. Ever.” (in Spanish: “Nunca hay costos, ni cargos. Jamás.”) to be suspicious. One respondent noted that this is typically language that companies sales pitches for a “free subscription” to something in which the company may start charging after a promotional period. The qualitative research led us to believe that this language is unnecessary, as it is clear from other text in materials that the

respondent will receive compensation for their opinion. Therefore, we recommend removing the language.

4.5 Visual Design: Bilingual Text

Most respondents reacted positively to the bilingual nature of the materials. In general, respondents expected English to be the prominent language in the United States but appreciated when materials were well translated into Spanish, as this is a signal that a company expressly cares about the Latino population.

However, respondents consistently found the initial bilingual materials to be too wordy and some respondents found text difficult to read when Spanish and English were close to each other on the same page.

To ameliorate this, we streamlined the text in all materials and, when possible, placed Spanish language text on one side of the material and English language text on the other, with an arrow indicating that the other language is on the other side. When this was not possible, Spanish and English language text was visually separated through graphic design elements, such as visual barriers and color (Huws, 2014).

4.6 Visual Design: Trustworthy Images

Several respondents indicated that the materials looked too corporate, which caused some issues of trust with respondents. They felt as though the target audience was business executives, and not “ordinary” people like themselves. They expressed that a more “personal” and “warmer” look to the materials would be more trustworthy.

Respondents reacted positively to the following edits: 1) Materials were more colorful and graphics more rounded (as opposed to square) to create a more dynamic and inviting design. 2) Photos of “model-looking” people were replaced with more “ordinary looking” people, which included images of the elderly, people with glasses, and families. Family is an important concept for Latinos that allows for identification and trust. 3) Cartoon-like images were included, which respondents indicated appealed to them as “ordinary” people.

Respondents responded positively to the cartoons in the materials and expressed that they felt the photos of families, elderly and more “ordinary” looking people represented them.

Respondents were also generally comfortable seeing the “NORC at the University of Chicago” logo and reported that, even if the university was unfamiliar to them, that a university is a mark of trustworthiness. We therefore included the NORC logo, in addition to the AmeriSpeak logo, in much of the materials.

5. Conclusion

Through focus groups and in depth interviews, we explored how concepts, language and design can be used to improve the effectiveness of panel recruitment material targeting Hispanic and Spanish-speaking populations.

Conceptually, we clarified the intention of our communication and focused on how AmeriSpeak is an opinion-sharing platform by which respondents could represent themselves and their families and communities to corporate, government, and other entities through taking surveys.

With regard to language, we made sure that connotations of words did not cause unintentional miscommunication during translation, reduced the quantity of text and simplified language.

We also redesigned materials to have a less corporate look-and-feel, through the use of increased color and by highlighting family as a theme. The design was also simplified to encompass both languages, readably and comfortably, in the same document.

These findings may be applied more generally to other surveys that target Hispanic or Latino populations.

Acknowledgements

We would like to acknowledge Carlos Garcia for consultation on this work, and also Dan Costanzo, Roopam Singh, Vicki Pineau and Michael Dennis for their support and review of this project.

References

- Albaum, G., and Smith, S. M. (2012). Why People Agree to Participate in Surveys. In L. Gideon, *Handbook of Survey Methodology for the Social Sciences* (pp. 179-193). New York: Springer.
- Burgos, D., Mobolade, O. (2011). *Marketing to the New Majority: Strategies for a Diverse World*. New York: St. Martin's Press.
- Cialdini, R. (1984). *Influence: The New Psychology of Modern Persuasion*. New York: Quill.
- Dennis, M.J. (2017). Technical Overview of The AmeriSpeak® Panel NORC's Probability-Based Research Panel.
Available at <http://amerispeak.norc.org/research/>
- Geveller, L. (2014). Your Next Big Opportunity: The U.S. Hispanic Market.
<https://www.thinkwithgoogle.com/consumer-insights/us-hispanic-market-digital/>
- Groves, R. (1989). *Survey Errors and Survey Costs*. New Jersey: John Wiley and Sons.
- Huws, M. (2014) Welsh Language Commissioner Bilingual Design Guide.
<http://www.comisiynyddygyraeg.cymru/English/Publications%20List/CYG1754%20Canllaw%20Dylunio%20ENGLISH.pdf>
- Michelson, M. (2005). Meeting the Challenge of Latino Voter Mobilization. In *The Annals of the American Academy of Political and Social Science*, Vol 601 (pp. 85-101).
- Montgomery, R, Dennis, M.J., and Ganesh, N. (2016). Response Rate Calculation Methodology for Recruitment of a Two-Phase Probability-Based Panel: The Case of AmeriSpeak.
Available at <http://amerispeak.norc.org/research/>
- Murillo, E. (2015) New Research Shows How to Connect With U.S. Hispanics Online.
<https://www.thinkwithgoogle.com/consumer-insights/new-research-shows-how-to-connect-with-digital-hispanics-online/>
- Shagrin, C. (2008). Hispanic Fusion – Finally Hitting the Bullseye: Fusion metrics get a direct hit.
http://www.nielsen.com/content/dam/nielsen/en_us/documents/pdf/Consumer%20Insight/Hispanic%20Fusion%20Finally%20Hitting%20the%20Bullseye.pdf
- Valdez, I. (2008). *Hispanic Customers for Life: A Fresh Look at Acculturation*. New York: Paramount Market Publishing, Inc.