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# Incentives to Increase Survey Returns: Social Class Considerations

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A number of studies have indicated that offering a monetary incentive influences the percentage of return in a mail survey [2, 3, 4, 9, 10, 11]. Within this group of studies, explorations have been made of the relative increase gained when the incentive is given immediately versus the increase when it is promised only upon the return of the completed questionnaire [10, 11]. As researchers have begun to look at *why* incentives increase return, however, the values held by the potential respondents have been seen as significant. One study [3], for example, noted the increase in return when the monetary incentive was given immediately and unconditionally and concluded that those receiving money experienced dissonance: their values prevented them from accepting payment without doing the task for which they were being paid—return of the questionnaire. Therefore, they returned it.

The study presented here, proceeding from this emphasis on values, was designed to take into account the variable of social class. This concept sees society as stratified by combinations of such factors as occupation, amount and source of income, education, house type, and neighborhood [8, p. 174], with individuals in each stratum holding values common to his stratum but different from the values of those in other strata. The objective of the study was to test in a lower-class neighborhood with black residents and in a middle-class neighborhood with white residents the relative effect of immediate monetary incentive versus conditional (promised) monetary incentive on percentage of questionnaires returned. It was felt that these two strata, viewed in sociological literature as holding dramatically different values, would offer the most vivid contrast for a test of this kind.

The neighborhoods were selected as lower-class and

middle-class respectively by adapting a method of inferring from Census data the social class of residents of a Census Tract [6]. Median family income, percentage of residents 16 or over in "blue collar" occupations, and percentage of residents who are high school graduates were the 3 indicators used. It was recognized that regardless of incentive techniques used to increase return, the total percentage of return would be smaller for the less well educated, lower-class respondents than for middle-class respondents [2, pp. 143, 148; 5, pp. 241-2]; the study simply sought to test the relative impact of immediate versus conditional incentives within both social class groups and compare the proportion of returns elicited from each group by each method.

## RESEARCH DESIGN

The data were collected based on mail returns from 400 questionnaires distributed in person to grocery store shoppers in Houston on a single Saturday in February, 1974. Distribution points were two supermarkets, part of a locally-owned chain. One was located in a middle-class neighborhood with almost exclusively white residents, the other in a lower-class neighborhood with almost exclusively black residents (see Table 1.)

At each store, a young woman matched by race to the store's clientele distributed 200 questionnaires. The questionnaires handed out with a 50-cent piece attached were alternated in blocks of 50 with those handed out with the promise that "we'll send you 50 cents when you send the questionnaire back." A questionnaire was placed in the shopping bag of each shopper 18 or over; to each questionnaire was attached a postage-paid envelope addressed to the Center for Research in Business and Economics at the University of Houston. Shoppers were told that the survey was being conducted by the university and concerned energy.

The questionnaire, five pages in length, required either check-off answers or ranking of answers numerically. On the last page, it asked for conventional demographic data including salary bracket and oc-

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**Table 1**  
1970 CENSUS DATA ON RESIDENTS OF CENSUS TRACTS  
IN WHICH QUESTIONNAIRES WERE DISTRIBUTED

Census tract number	Store A	Store B	City of Houston
	307	426	
Median family income	\$6998	\$13,042	\$9876
Percent of White residents	4.6%	99.9%	74.3%
Percent of Negro residents	95.4%	.1%	25.7%
Percent of residents 16 or over in "blue collar" occupations	59.9%	19.7%	45.4%
Percent of residents who are high school graduates	55.0% <sup>a</sup>	78.5%	51.8%

<sup>a</sup> A possible explanation for the fact that this percentage exceeds the city average lies in the fact that this Census Tract contains fewer than 400 Spanish surname individuals, the ethnic group with the lowest percentage of high school graduates in Houston.

cupation. Also, the respondent was asked to fill in his or her name and complete address.

All questionnaires were identical except for one sentence of the message on the first page, which mentioned "50 cents for your time" on one form and "50 cents for your time, which we will mail to you when you return the questionnaire" on the other form. Also, an inconspicuous marking near the staple distinguished those questionnaires given out in the lower-class neighborhood from those given out in the middle-class neighborhood.

### RESULTS

Only 28 of 428 offers of questionnaires were refused—16 before any type of incentive could be offered, 3 when 50 cents was offered, and 9 when 50 cents upon return of the questionnaire was offered. In addition, 10 shoppers who were offered 50 cent pieces refused the money but took the questionnaire.

Of the 200 questionnaires distributed in the middle-class neighborhood, 99 were returned—54 by shoppers who were given 50 cents with the questionnaire and 45 by shoppers who were promised 50 cents after they mailed the questionnaire back.

Of the 200 questionnaire distributed in the working-class neighborhood, 40 were returned—15 by shoppers who were given 50 cents with the questionnaire and 25 by shoppers who were promised 50 cents after they mailed the questionnaire back. Table 2 compares number of returns from both neighborhoods.

Of the 139 returned questionnaires, 133 had been completed in full, including demographic information. These were returned by 62 men and 71 women. Of the six returned questionnaires which were not filled out completely, five forms omitted demographic data, and one was blank but had a 50-cent piece taped to it. Five respondents asked on the forms which they returned that they not receive the 50 cents to which they were entitled.

The data were analyzed by using a chi-square test for independence (see Table 3) to test whether lower-class and middle-class shoppers responded in the same proportions to the two incentive treatments, resulting in the same percentage of return in both groups from an immediate incentive versus a promised incentive. It was possible to reject ( $p \leq .01$ ) the hypothesis that the lower-class and middle-class groups responded in the same proportions to the two different incentive methods [1, pp. 379-381]. The nonparametric test was chosen because a convenience sample of shoppers was used rather than a random sample drawn from the two Census Tracts.

### COSTS

A comment on relative costs of the two incentive methods should be noted here. To hand a shopper 50 cents costs 50 cents with probability of 1.0; to hand a shopper a promise of 50 cents after questionnaire return costs 61 cents (a 10-cent stamp on the envelope to mail the 50 cents back, plus the envelope itself) with a probability unknown, (but in this study, .35). Thus, omitting the costs of labor in mailing out 50-cent pieces, costs with both methods "break even" at about an 82% return rate; below that figure, the immediate incentive is more costly. To the extent that the immediate incentive is more effective in eliciting returns, however, it pays for itself in the greater confidence that can be placed in the data as representative of the views of the entire sample. The question addressed by this study has been simply which method is more effective in eliciting returns in two different social classes.

**Table 2**  
RESPONSES FROM A MIDDLE-CLASS AND A  
LOWER-CLASS NEIGHBORHOOD TO IMMEDIATE VERSUS  
CONDITIONAL INCENTIVES FOR QUESTIONNAIRE  
RETURN

Class and incentive	Questionnaires		
	Returned	Not returned	Total
Middle-class 50 cents immediately	54	46	100
Middle-class 50 cents promised	45	55	100
Lower-class 50 cents immediately	15	85	100
Lower-class 50 cents promised	25	75	100
Total	139	261	400

**Table 3**  
**COMPUTATION OF CHI-SQUARE FOR A TEST OF**  
**INDEPENDENCE IN RESPONSES OF TWO GROUPS OF**  
**DIFFERENT INCENTIVE TREATMENTS**

	<i>fo</i>	<i>fe</i>	<i>fo-fe</i>	$(fo-fe)^2$	$\frac{(fo-fe)^2}{fe}$
1. 50 cents immediately, middle-class; questionnaire returned	54	35	19	361	10.31
2. 50 cents immediately, middle-class; questionnaire not returned	46	65	-19	361	5.55
3. 50 cents promised, middle-class; questionnaire returned	45	35	10	100	2.86
4. 50 cents promised, middle-class; questionnaire not returned	55	65	-10	100	1.54
5. 50 cents immediately, lower-class questionnaire returned	15	35	-20	400	11.43
6. 50 cents immediately, lower-class; questionnaire not returned	85	65	20	400	6.15
7. 50 cents promised, lower-class; questionnaire returned	25	35	-10	100	2.86
8. 50 cents promised, lower-class; questionnaire not returned	75	65	10	100	1.54
Total	400	400	0		$\chi^2 = 42.24$
					$\chi^2 .01, 3 \text{ d.f.} = 11.345$

### CONCLUSIONS

To the extent that the results of this study can be generalized, they indicate a difference in the response of lower-class and middle-class respondents to a conditional versus immediate incentive to return a questionnaire. As expected, both methods of offering the 50-cent incentive resulted in a higher rate of return from middle-class individuals as opposed to lower-

class individuals. However, it appears that the immediate incentive may increase this difference in return rate between classes. Therefore, for a survey in which a greater return from lower-class respondents is particularly desired, the conditional incentive appears to be better, even if some percentage of middle-class responses are thereby lost. At least, the researcher should consider the values of various groups of potential respondents before designing his method of increasing return. He should not expect middle-class "dissonance" at "taking money for nothing" to extend to the lower class in equal measure.

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