Data Collection Brief

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Using Social Media for Survey Notifications: Considerations from STREAMS

In recent years, changes in technology and modes of communication have posed new challenges for studies that use surveys to collect data from study participants. Because of fewer landlines, spam filtering caller ID applications, and lack of participant responses to outreach efforts, new and creative methods for reaching participants are necessary. The challenge is particularly acute for studies involving younger study participants (younger than 18) who might be harder to reach by email or phone. In the Strengthening Relationship Education and Marriage Services (STREAMS) evaluation, we conducted a small-scale pilot using the social media platform Instagram to remind high-school-age students to complete a study follow-up survey. We conducted the pilot as part of a broader outreach strategy that included more traditional letters, text messages, and email reminders. Given the age of the STREAMS population (youth in their last years of high school or recent high school graduates), we anticipated that many were likely active on social media platforms, such as Instagram. Anticipating that we might use social media to locate sample members for future survey efforts, we collected Instagram handles for a sample of respondents during the study's baseline survey.

For more information about the Strengthening Relationship Education and Marriage Services (STREAMS) evaluation, visit the project's web page at https://mathematica.org/projects/streams.

Drawing on our experience, this brief highlights six considerations for using social media in research study outreach and tracking. Although the considerations stem from our specific experience with Instagram, they likely apply to other, similar social media platforms. The considerations might be particularly relevant to researchers who need innovative methods to contact populations that might be difficult to reach through more traditional notification methods.

START WITH A CLEAR PURPOSE

A study team might consider using social media in several ways to support a longitudinal research study. For example, one potential use of social media is to keep participants engaged with the study, so they are easier to locate when due for a follow-up survey. For this purpose, a study team might encourage sample members to like or follow a social media page created for the study. The social media page would serve as a source of frequent updates about the study or topic area, to keep study participants engaged over time. Consequently, when reaching out to participants due for a follow-up survey, the study team might have an easier time contacting participants, and participants' familiarity with the study might make them feel more inclined to complete the follow-up survey. For this type of page to be successful, a study team would have to regularly generate original content to keep sample

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members engaged. We decided against this approach for STREAMS because we were uncertain the potential benefits were enough to justify the investment required to regularly generate original content.

Instead of using Instagram to promote engagement with the study, we used it in STREAMS to contact sample members through direct messages to ask them to complete a study follow-up survey, similar to sending text message reminders. To use Instagram or other social media platforms for this purpose, a study team must still make occasional posts to its account, to ensure the account remains active. Our posts for STREAMS were modified versions of graphics or photos we had used in letter and text message notifications. Apart from these occasional posts, we used our account primarily for sending direct messages to study participants tied to the study data collection, rather than for more general engagement.

Deciding the purpose of social media outreach is important because the logistics, considerations, and time required for each purpose differ. For example, as we discuss later in this brief, contacting participants directly through social media poses several logistical challenges and can require a labor-intensive process. On the other hand, coming up with regular content for engagement could also require resources and present logistical challenges. Studies should consider and prioritize what they are striving to do—immediate direct contact versus long-term engagement. For STREAMS, we decided against this long-term engagement approach because we were doing a pilot tied to one particular follow up survey, with no plans for additional outreach.

DETERMINE THE BEST PLATFORM TO USE

There are several social media platforms, each with varying features and evolving levels of popularity. In deciding which platform is the best fit for a study's needs, the study team must consider security and privacy requirements, desired messaging capabilities, ability to interact with other accounts or users, and expected popularity of the platform among the study's intended population. For STREAMS, we asked participants at study enrollment to provide their social media handles for Facebook, Instagram, and Twitter. Among those, we found that participants provided the most account information for Instagram. Instagram also met our requirements for sending private direct messages to participants, which influenced our choice. Our participants provided less account information for Facebook and Twitter, so we excluded these platforms from our pilot. Although we used only one platform for STREAMS, other studies could consider using multiple platforms if they have sufficient information and resources. Regardless of which or how many platforms a study team chooses, the team must account for these platforms in its data collection procedures and make a concerted effort to collect relevant account information and social media handles for as many study participants as possible.

SEEK INSTITUTIONAL REVIEW BOARD (IRB) APPROVAL

As with any outreach method, using social media in study data collection is subject to IRB approval. The study team must consult with and defer to the determination of its IRB. To facilitate IRB review, the study team should clearly describe who it will contact through social media, how they will be contacted (including the frequency), what type of identifying information will be included in the notification, and any other relevant information.

For our initial IRB application for STREAMS, we included that we might use social media outreach, citing evidence of its use with similar populations in the past. We described this outreach as being similar to notifications sent by email or text and specified that we would include only IRB-approved language in our social media notifications and that we would send these notifications only to youth who had voluntarily provided their social media handles. We did not propose searching for study participants through social media or using social media to contact participants who had not voluntarily provided their handles. The IRB approved our proposed use of social media under these conditions.

TAKE PRECAUTIONS WHEN SETTING UP THE ACCOUNT

Social media platforms, such as Instagram, use multiple screening tools and methods to assess the legitimacy of user accounts and restrict those that present a risk to other users. These screening tools and methods are meant to prevent spamming, help protect users against the spread of misinformation, and prevent user fraud and account hacking, among other reasons. When an account violates the platform's standards and guidelines, the account may be blocked or suspended.

When setting up a social media account for a research study, the study team must take steps to ensure the account complies with platform requirements and can remain active. This means setting up and operating the account in a way that is consistent with an account run by a legitimate person or group, as opposed to one set up by spammers. Creating a legitimate account that complies with platform requirements is also important for developing and maintaining trust with study participants who might look at the account profile.

Although the steps to follow likely vary depending on the social media platform, we found that the following were important for our Instagram account when we sent direct messages to study participants:

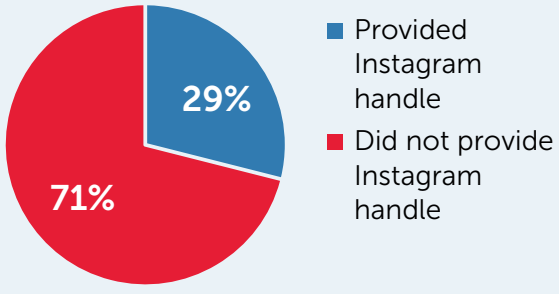
- Start slowly by sending only a few direct messages per day, sending the message with slightly different wording, excluding the study URL in some messages or for a certain period of time, and taking pauses on sending out messages. Once you have been able to send messages without a problem, then you can increase the volume or frequency of sending messages.
- Create posts for your account.
- Follow the accounts of other users and get other users to follow your account. For example, for STREAMS, we followed the accounts of federal agencies and research organizations tied to the study, including the U.S. Department of Health and Human Services, Mathematica, and the Office of Planning, Research, and Evaluation.
- Regularly like posts from other accounts, such as those listed above.

IF SENDING DIRECT MESSAGES, BE PREPARED FOR A LOT OF WORK

For STREAMS, we used Instagram to send direct messages to study participants when they were due for a follow-up survey. The direct messages included links to individualized surveys and replicated the types of personalized messages often used in email and text message reminders. We hoped these direct messages would make it easy for study participants to complete the follow-up survey and aimed to successfully reach study participants who might not respond to email or text message reminders.

However, sending direct messages through Instagram required setting up several new labor-intensive processes. After we had collected social media handles from study participants on the baseline survey, a study team member had to manually review the handles to check for their legitimacy. This entailed searching each handle on Instagram and then cross-checking the available information on the account in their bio or posts (if their account was public) with the participants' names. Although this approach is not guaranteed to accurately identify participants, we nonetheless found it helpful as an initial check

Percentage of respondents who provided Instagram handles



on the validity of the account handles. For STREAMS, the handle review process did not need to confirm a 100 percent match, as we had designed the follow-up survey to include additional respondent verification checks. These additional verification checks in the survey helped ensure that only the specified participant would be able to complete their individualized survey link. Twenty nine percent of the total STREAMS study participants provided an Instagram handle, of which only a portion were legitimate handles.

After checking the Instagram handles against the information in the user accounts, we manually sent direct messages to participants with valid handles. The direct messages usually included their name, a brief explanation of the study, an individualized survey link, and a number they could call to complete the survey by phone. In line with the guidance about taking precautions when setting up the account, we developed strategies to minimize the possibility of having our account (or key features of our account, such as sending direct messages) restricted or suspended by the platform. One strategy was sending different versions of the message, which contained the same information but with different wording. Other strategies included sending some messages without the individualized survey URL, in case messaging a URL to a new contact activated an Instagram spam filter. For all the direct messages we sent, we focused on developing succinct, engaging text that would be easy for study participants to understand. For studies that do happen to have their accounts restricted or suspended, some platforms have processes to petition the restriction. However, study teams should prepare for the possibility of needing to create an entirely new account if their initial accounts are repeatedly or permanently restricted.

While sending out direct messages, we recorded which participants had received messages and when we sent the messages. Recording this information helped us determine if and when to send follow-ups. Typically, we waited a few weeks between sending direct messages, in part to avoid the appearance of spam. Spacing out the direct messages also gave us time to distribute other types of reminders, including letters, text messages, and email notifications. To maintain consistency and accurately track the direct messages sent from our Instagram account, we designated a single person on the study team to spearhead this effort.

DEVELOP A PROCESS FOR MEASURING SUCCESS

Because of the effort required to send direct messages, it is important to track the results of these efforts and how they contribute to data collection. It is also useful to compare how direct messages perform against other notification efforts used during the study, such as text messages or email notifications.

Engagement with Instagram survey links	
Total number of respondents that received links	88
Number of respondents who clicked the link and completed the survey	4
Number of respondents who clicked the link and did not complete the survey	12
Number of respondents that did not click the link	72

For STREAMS, we developed a special URL that we "tagged" for Instagram, so if anyone clicked the URL to access the survey through our Instagram message, that interaction would be recorded in data files. Using data from this tag enabled us to monitor which respondents were visiting the survey through Instagram notifications as opposed to other mailings, emails, and text messages used for the study. Using this tagged URL enabled us to easily analyze and review completes. For STREAMS, we successfully sent survey links through Instagram to 88 respondents. Of these, 16 respondents (18 percent) opened the link, and 4 respondents (5 percent) completed the survey. Because we attempted this mode of contact with only a small number of participants, we did not compare these survey completion rates with the completion rates achieved through other types of notifications. However, our experience from other Mathematica projects indicates that other notification methods can yield higher response rates for a given level of effort.

WAS ADDING SOCIAL MEDIA OUTREACH WORTH IT?

We approached this effort for STREAMS as a pilot and supplement to more traditional notification efforts. All respondents received many other notifications by text, email, and mailings. Our findings indicate that, when used as a pilot supplement, social media outreach did not add many responses beyond what we obtained through other notifications. However, we expect we could have obtained more responses had we planned to use social media outreach on a larger scale as the study's primary notification strategy. Social media outreach has the potential to help study teams address the challenge of reaching participants for surveys, particularly if that outreach involves additional planning and draws on lessons highlighted in this brief. This is especially true for studies involving youth and other populations that are hard to reach through more traditional notification efforts.

ABOUT THE STREAMS EVALUATION

Since the early 2000s, the Administration for Children and Families (ACF) in the U.S. Department of Health and Human Services has led a sustained effort to expand the available evidence on healthy marriage and relationship education (HMRE) programs. In 2015, ACF contracted with Mathematica and its partner, Public Strategies, to conduct the Strengthening Relationship Education and Marriage Services (STREAMS) evaluation to help identify strategies for improving the delivery and effectiveness of HMRE programs. The evaluation has a particular emphasis on understudied populations and program approaches not covered in ACF's prior federal evaluations. STREAMS includes in-depth process studies, random assignment impact studies, a rapid-cycle evaluation of text message reminders to improve attendance at HMRE group workshops, a formative evaluation of a facilitation training curriculum for HMRE programs for high school students, and predictive analytic modeling of attendance at HMRE group workshops. Learn more about the evaluation at https://www.acf.hhs.gov/opre/research/project/strengthening-relationship-education-and-marriage-services-streams.

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