



## **The effects of material incentives in face-to-face surveys. The experience of the ESS Project in Poland**

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This paper focuses on the effects of material incentives in face-to-face surveys. We discuss the experience of the ESS Project in Poland. We will draw on the methodology research conducted in connection with the ESS to show how incentives have worked in Poland, i.e. how the incentives used to date have performed. Polish respondents are divided in their opinions regarding the use of incentives in surveys. This attitude is driven by two types of motivations. Some comments indicate that participation in surveys is seen as a kind of 'duty to the public', which should not entail any reward. Other opinions collected in our studies indicate that at least some respondents in Poland expect some kind of reward in connection with their participation in a survey.

The European Social Survey. Material Incentives.

**This paper is an abridged version of 'What do respondents and non-respondents think of incentives and how do they react to them? The ESS experience in Poland', which was published in *ASK. Research & Methods*. Vol. 21 (1, 2012): 87-122. This version has been extended by additional data concerning the application of gifts.**

### **The problem**

The ever declining response rate in surveys motivates researchers to employ a variety of strategies in an attempt to increase it or, at least, to hamper its decline. Researchers can choose from a broad array of options which may potentially help to boost the response rate (for an overview for face-to-face surveys, see, e.g., Koch et al. 2010), yet only two of such options focus directly on the respondent. Those methods include letters motivating the respondents to take part in a survey (advance letters, in most cases) and respondent incentives. Incentives are increasingly used in research practice. In the case of Europe, this may be illustrated by data from the European Social Survey (ESS). Out of the 16 countries participating in all five ESS rounds conducted to date, seven countries used incentives in ESS 1 (2002), ten did so in ESS 3 (2006) and 13 opted for this solution in ESS 5 (2010).

Undoubtedly, the use of respondent incentives does help to boost the response rate in surveys. This trend has been established in the case of mail surveys (Kanuk and Berenson 1975, Heberlein and Baumgartner

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1978, Yu and Cooper 1983, Fox et al. 1988, Church 1993, Jobber et al. 2004), as well as interviewer-mediated (face-to-face and telephone mode) surveys (Singer et al. 1999, Singer et al. 2000, Curtin et al. 2007). Experiment results also indicate that monetary incentives have a stronger effect on improving the response rate in comparison with gifts (for review see Church 1993 and Singer et al. 1999).

In the European research practice, as illustrated by the example of the European Social Survey (ESS) project, a wide variety of incentives are applied. Some countries use cash, others opt for vouchers (e.g. high street shopping vouchers, train vouchers, flower vouchers, dinner vouchers), still others use donations to a charity organisation or lottery tickets (an opportunity to win cash, laptops, weekend trips etc.). Some countries have used gifts such as jigsaw puzzles, T-shirts and caps, calendars, calculators or brochures containing a substantive analysis of results from previous ESS rounds. In some countries the incentives are identical for all the respondents whereas in others the respondents are given a choice of two or more options.

This diversity of practices with respect to incentives may stem from a variety of reasons. For instance, it may result from different legal regulations across countries (e.g. some countries prohibit cash in mailed letters or prohibit cash as a reward offered to survey respondents), budget constraints faced by researchers (material incentives usually have a lower value than monetary incentives; the same applies to lottery tickets i.e. when the value of the prizes is subdivided by the number of respondents), or different cultural backgrounds and related differences in respondents' reactions to various kinds of incentives.

In this paper, we will draw on the methodology research conducted in connection with the ESS to show how incentives have worked in Poland, i.e. how the incentives used to date have performed.

As the theoretical background for our analysis, we will draw on the theory of social exchange elaborated by Dillman (1978, 2000), according to which people's actions are motivated by the expectation that they will elicit the expected return actions from other people. When we analyse the performance of incentives, the distinction between economic exchange and social exchange is of crucial importance. Economic exchange is based on a monetary equivalent for a specific action (such as giving an interview, for instance). In turn, social exchange is more vague and the decision about 'returning the kindness' is left for the person who takes part in the exchange. This theory, however, is not about a simple distinction between using monetary incentives and other kinds of incentives. Rather, the essence of social exchange is to establish trust between its participants (2000, 14).

### **Incentives in the European Social Survey in Poland**

In Poland, incentives have been used in the European Social Survey (ESS) since round 3 (2006). While the response rate in ESS 1 (2002) and ESS 2 (2004) stood at 73%, it was decreasing systematically in other surveys conducted in Poland. For instance, the response rate in the Polish General Social Survey (PGSS) which, much like the ESS, is conducted by an academic institution (University of Warsaw), fell by nearly 18 points between 1995 and 2005 (Cichomski et al. 2009). Therefore, there was a considerable risk that the response rate might drop significantly in subsequent ESS rounds as well.

The decision by the Polish ESS team to use incentives was based on the following general rules:

1. Material incentives rather than monetary incentives should be used, for two reasons. Firstly, considering the research budget, we were able to spend approx. PLN 6-8 (EUR 1.5-2) per incentive. There was a considerable risk that a small size of monetary incentives might irritate the respondents and, consequently, cause the response rate to fall. Secondly, we wanted to use an unconditional incentive (see below) and had to bear in mind that sending cash inside a letter is not legal in Poland.
2. The incentive should be unconditional, i.e. given to each sampled person, regardless of her/his decision about survey participation. However, we decided that the incentives should be handed over by the interviewer personally rather than sent by mail. There were two reasons behind that decision. Firstly, the postage costs would have driven the costs of the survey. Secondly, in urban areas where the vast majority of flats have buzzers at the entrance door, this solution opened an opportunity for face-to-face contact, also in case of a refusal. When hearing a refusal, the interviewer was instructed to say that he/she was required to leave a keepsake for the respondent as a reminder of being drawn for the survey. Considering the important role of interviewers in the sampled persons' decisions regarding participation, we hoped that face-to-face contact, especially involving an incentive, would make it harder for the sampled persons to refuse.

3. Gifts should be as versatile as possible rather than adapted to selected target groups. Gifts focused on specific target groups could have had a negative effect on sample composition, causing overrepresentation of certain groups.

4. A choice of gifts should be offered (from among at least three available options). The results of our earlier experiment, conducted in connection with the pilot study before ESS 3, indicated that when the respondents are given a choice of gifts, this may play an important role in increasing the response rate. Incidentally, the idea to offer a choice of gifts seems to be in line with the theory of social exchange elaborated by Dillman (2000, 15-17), since the possibility to choose between gifts represents an additional reward for the respondent.

5. The selection of gifts is crucial. Dillman (2000, 250) formulates a hypothesis that lower effectiveness of such gifts versus monetary incentives results from the inability to tailor gifts to respondents' interests. Market research experience in Poland has shown that material incentives should not look like small gifts purchased in the local equivalent of 'dollar stores' (MillwardBrown SMG/KRC: personal communication). Therefore, it is not recommendable to use alarm clocks, calculators or similar common items. A gift in a survey must come in a package with a printed logo of the research institution and/or the survey, which would additionally distinguish it from 'dollar store' goods and, moreover, indicate its connection with the survey. In ESS 3 (2006) we used the following gifts: (1) a calculator with a ruler, 20 cm long, scaled in centimetres and inches, in grey colour, (2) a foldable pen in blue, green or pink colour (at respondent's choice) on a lanyard, and (3) a wall calendar with a landscape photo.

In ESS 4, the following gifts were used in Poland: a calculator with a ruler (exactly the same as in ESS 3), a pocket calendar with a green or blue cover (to choose from) and a wall calendar. This time, the calendar featured the building of Institute of Philosophy and Sociology, Polish Academy of Sciences.

In ESS 5, gifts used in Poland included a wall calendar (very similar to that offered in ESS 4), a key ring with a small torch and a notepad with a pen, made from recycled paper, the latter aiming to make a positive impression on the respondents.

In ESS 6 we used gifts which were very much like those in ESS 5 and, additionally, we added a shopping bag in red and navy blue.

The validity of each gift sets had been previously checked in the pilot study. Despite the declining response rates in Poland, those incentives may have helped to curb the decline in the ESS. The response rate reached 70.2% in ESS 3 (2006), 71.2% in ESS 4 (2008), 70.3% in ESS 5 (2010) and 74.9% in ESS6 (2012).

## **The data**

In order to assess the performance of incentives in Poland and, consequently, to check some of the general rules adopted, we will use two kinds of empirical evidence. The first set comprises data on gifts collected by interviewers during the fieldwork of ESS 3, 4, 5 and 6. The interviewers were required to record how the respondents reacted to the gifts, whether or not the gift was accepted and which gift was chosen. Additionally, in ESS 3 and ESS 5 the interviewers were asked to take down respondents' comments made in connection with the gifts. The comments quoted below are marked accordingly as coming either from ESS 3 or ESS 5.

The second type of empirical data are individual in-depth interviews (IDIs) conducted with non-respondents and converted refusers from ESS 3 and ESS 4. In total, 30 IDIs with individuals from various regions of Poland were conducted. The verbatim statements quoted later are marked accordingly: IDI number /2007 or IDI number /2009.

## **Reactions to gifts in the ESS**

Before discussing the sampled persons' reactions to gifts, we should make two reservations. Firstly, we have discussed reactions to the sets of three or four gifts which were applied in subsequent ESS rounds. One cannot exclude the possibility that reactions would have been different if different gifts had been used.

Another reservation concerns the data on reactions to gifts. In each ESS round, the interviewers did not get a chance to offer a gift to a fairly high percentage of the respondents, ranging from 12.4% to nearly

19%. Those were situations when, for instance, the sampled person had changed address and the new address was impossible to establish, or when the sampled person had moved abroad or was absent throughout the fieldwork period. Such situations also occurred in a very significant percentage of refusals i.e. very firm refusals, without any possibility to talk to the respondent and offer a gift. In subsequent ESS rounds, the interviewers had no opportunity to offer a gift in the case of 28.8% (in ESS 6) to 40.2% (in ESS 3). Obviously, the reactions of the sampled persons to the gift, as shown later in this paper, do not cover those cases. Since, as we will show later, the vast majority of refusers who were offered a gift reacted negatively, one may assume that reactions would have been similar in the case of those hard refusers who were never offered a gift. Consequently, negative reactions are probably underestimated in the results presented below.

Reactions displayed by various categories of sampled persons included in our analysis are presented in Table 1.

**Table 1:** Sampled persons' reactions to gifts offered in ESS 3, 4, 5 and 6 (percentages of mentions, based on interviewers' records)

ESS round	Very positive	Fairly positive	Neutral	Fairly negative	Very negative
ESS 3 (2006)	30.4	44.1	22.7	1.8	1.0
ESS 4 (2008)	26.0	43.0	24.4	3.1	3.4
ESS 5 (2010)	30.1	41.4	22.2	2.7	3.6
ESS 6 (2012)	19,8	55,0	23,1	1,5	0,6

In all ESS rounds, reactions to gifts were fairly similar. Positive reactions strongly prevailed: they were displayed by nearly 70% to nearly 75% of the sampled persons who were offered a gift. Neutral reactions were recorded in the case of approx. ¼ of the sampled persons and this share is also stable. Negative reactions represent a minority in all rounds.

However, some sampled persons who were offered a gift, refused to accept it. That percentage was 3.0% in ESS 3, 5.8% in ESS 4, 5.7% in ESS 5 and 2.1% in ESS 6.

In order to assess the performance of gifts used in the ESS, we compared the percentages of completed interviews, refusals and non-contacts among the sampled persons who accepted the gift and those who rejected it. The respective data are provided in Tables 2 and 3.

**Table 2:** Percentage of successfully completed interviews, refusals and non-contacts among the sampled persons who accepted the gift

ESS round	Completed interviews	Refusals	Non-contacts
ESS 3 (2006)	87.3	9.7	3.0
ESS 4 (2008)	92.0	7.1	0.9
ESS 5 (2010)	91.0	7.5	1.5
ESS 6 (2012)	92.6	6.1	1.3

**Table 3:** Percentage of successfully completed interviews, refusals and non-contacts among the sampled persons who rejected the gift

ESS round	Completed interviews	Refusals	Non-contacts
ESS 3 (2006)	6.6	88.5	4.9
ESS 4 (2008)	8.5	85.1	6.4
ESS 5 (2010)	2.9	91.3	5.8
ESS 6 (2012)	0.0	93.2	6.8

As shown in Tables 2 and 3, agreement to take part in the survey co-occurs with acceptance of the gift whereas a refusal co-occurs with rejection. The percentage of successfully completed interviews among those who accepted the gift ranged from 87% to nearly 93%. Only in relatively few cases, i.e. from 6% to under 10%, the sampled person refused to take part in the survey despite accepting the gift. In turn, rejection of the gift usually coincided with a refusal: in 85% to 93% of cases. Only relatively few of those who rejected the gift agreed to be interviewed, and their share seems to be shrinking. This suggests that acceptance of a gift is, indeed, connected with participation in a survey.

Based on the data presented here, it is difficult to conclude unambiguously that what we are dealing with is a cause-effect relationship. Quite possibly, the gifts may have been accepted more often by individuals who had a positive attitude towards the survey and were willing to participate in it, and rejected by those who demonstrated a negative attitude. On the other hand, some other results (not shown here) indicate a strong relationship between reactions to the gift (positive, neutral or negative) and participation in the survey. Moreover, some comments made by the sampled persons clearly indicate a connection between acceptance or non-acceptance of the gift and participation in the survey. Here are some examples: *'After accepting the gift/ 'Well, if you're being so nice, let's talk after all.'* (ESS 5. F, 86 y.o., town up to 10K, gift accepted, agreed to be interviewed); *'Since I got such a pretty calendar, I must agree to do that survey.'* (ESS 5. F, 66 y.o., city 500-999K, gift accepted, agreed to be interviewed); *'If one gets a gift, one needs to take part in that survey.'* (ESS 3. F, 46 y.o., city 500-999K, gift accepted, agreed to be interviewed); *'I'm not taking part in this survey so I won't take a gift.'* (ESS 5. F, 42 y.o., city 500-999K, gift rejected, refused to get interviewed).

Although the findings presented above do give some idea of the overall attitude towards gifts in surveys, they obviously refer only to gifts used in ESS 3, 4, 5 and 6 in Poland. One pointer concerning the selection of gifts in other surveys may come from spontaneous comments made by the sampled persons in response to the interviewer's offer to leave a gift. Such comments reveal the characteristics of gifts which attracted attention. The frequencies of various kinds of comments are shown in Table 4. Percentages are based on the total number of individuals who were offered a gift.

**Table 4:** Topics of comments made by the sampled persons/proxies in connection with the gift offered\*

Comment category	ESS 3	ESS 4	ESS 5	ESS 6
Usefulness for the respondent (total)	37.0	37.8	33.7	44.9
of which: useless	0.4	1.0	0.6	0.8
Usefulness for wife, child, grandchild etc. (total)	16.3	13.2	10.0	15.4
of which: useless	0.0	0.6	0.3	0.8
Aesthetic impression (total)	6.9	13.6	14.2	30.4
of which: ugly	0.0	0.2	0.1	0.3
A keepsake, a souvenir (total)	13.1	14.3	18.6	23.2
Price/value (total)	3.2	6.1	8.1	14.5
of which: too low	0.5	1.5	0.9	1.4
Attempted bribe, distrust (total)	0.6	0.7	0.6	2.2
Other comments (total)	25.1	19.6	24.1	32.8

\*The percentages do not add up to 100% since some respondents made comments on more than one characteristic of the gifts.

The data provided in Table 4 show that comments related most frequently to the usefulness of the gift for the sampled person (more than 1/3 of all comments, and nearly a half in ESS 6) or, less frequently, for a family member (10-16%). Here are some examples: *'I will have somewhere to write down dates of my doctor appointments.'* (ESS 5. M, 83 y.o., city 500-999K, gift accepted, agreed to be interviewed); *'I'm going to use the torch for the car.'* (ESS 5. M, 25 y.o., town up to 10K, gift accepted, agreed to be interviewed). Fewer comments indicated that the gift would be kept as a keepsake or a souvenir (13-23%) or concerned the aesthetic impression made by the gift (7-30%). Below are sample comments of this kind: *'A well-chosen gift. The image of the Polish Academy of Sciences building will remind me of participation in this study.'* (ESS 5. F, 56 y.o., city 100-199K, gift accepted, agreed to be interviewed); *'I like the calendar, it's nice 'cause the numbers are large.'* (ESS 5. M, 60 y.o., village, gift accepted, agreed to be interviewed); *'A nice, tasteful gift.'* (ESS 5. M, 31 y.o., town up to 10K, gift accepted, agreed to be interviewed).

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Comments concerning the price/value of the gift in the ESS were made very rarely, yet their frequency increased from round to round. Presumably, the rare occurrence of such comments is related to the social norm which prescribes that it is not appropriate to comment on the value of a gift. This hypothesis is confirmed by the fact that the reservations about the low value of the gifts are infrequent and stable. Here are some examples of remarks on price/value: *'They could have tried harder.'* (ESS 5. F, 53 y.o., town 20-49K, gift accepted, agreed to be interviewed); *'A cheap gadget, but it's very useful and it's got a very nice colour.'* (ESS 5. F, 24 y.o., city over 1 million, gift accepted, agreed to be interviewed).

Comments indicating distrust were very rare, which is presumably related to the presence of the ESS logo on each gift. Here is a selection of such comments: *'I don't accept any gifts 'cause I'll have to pay for them in a moment. They will nag me with phone calls or reminder letters. I've got bad life experience and I just can't believe there could be a free lunch.'* (ESS 5. F, 51 y.o., town 20-49K, gift rejected, refused to get interviewed); *'Are you sure I don't have to pay anything for that?'* (ESS 5. F, 75 y.o., town 20-49K, gift accepted, agreed to be interviewed); *'Are you trying to bribe me?'* ESS 5. M, 57 y.o., village, gift accepted, agreed to be interviewed).

## Summary and discussion

Polish respondents are divided in their opinions regarding the use of incentives in surveys. Some (few) respondents of our studies reject any incentives altogether. This attitude is driven by two types of motivations. Some comments indicate that participation in surveys is seen as a kind of 'duty to the public', which should not entail any reward. Here are a few sample opinions of this kind: *'A thank-you gift in a typical survey feels, sort of, awkward. It's like paying people to go to the elections. One has a negative reaction to it'* (IDI 3/2007. M, 31 y.o., secondary educ., police administrator, city 200-499K); *'I'm doing a survey but not for a gift'* (ESS 5. F, 38 y.o., city 200-499K, gift rejected, agreed to be interviewed). Other respondents who were against incentives made a negative ethical judgment, believing that an incentive might be an attempt to influence people's decisions about taking part in a survey. *'I'm not really in favour /of using incentives/ because I think that this creates an obligation for me. If I feel like it, I'd answer a few questions.'* (IDI 12/2009. F, 40 y.o., post-secondary educ., accountant, city 100-199K); *'If I accepted it, I would be committing myself.'* (ESS 5. M, 34 y.o., village, gift accepted, refused to get interviewed).

However, other opinions collected in our studies indicate that at least some respondents in Poland expect some kind of reward in connection with their participation in a survey. This attitude is illustrated by these sample quotes: *'Incentives/ Well, that's not a bad idea because you get some reward after all. A partial one. And you get that sense of satisfaction, too. If you didn't get anything in return, you'd be left empty-handed. Someone came over, interrupted you, said 'thank you' but that's all.'* (IDI 13/2007 M, 17 y.o., student, city 200-499K); *'It's good that they have thought about me and they're not just using me.'* (ESS 3. M, 59 y.o., city 500-999K, gift accepted, agreed to be interviewed).

Overall, however, the behaviours displayed by sampled persons and recorded by interviewers in connection with the ESS gifts indicate that it is reasonable to apply gifts in surveys conducted in Poland. Approximately 70-75% of the respondents responded positively to a gift, and approx. 90% of the sampled persons who accepted the gift also agreed to take part in the survey. Moreover, approx. 90% of the sampled persons who refused to accept the gift also refused to take part in the survey. While, based on our data, we cannot conclude that we are dealing with a cause-effect relationship, yet the theory of social exchange might suggest a hypothesis that acceptance of a gift during an interviewer's visit builds a sense of obligation on the part of the respondent, thus creating a social exchange relationship. In turn, a refusal to accept a gift usually means a rejection to establish a social exchange relationship.

The sense of commitment in connection with the gift is demonstrated not only in the reactions of the sampled persons who accepted it and agreed to take part or rejected the gift and refused to participate. Such a sense of obligation also occurred among some people who accepted the gift but refused to take part in the survey. Here are some verbatim statements illustrating this claim: *'I felt awkward. I said 'no' because I didn't take part and I didn't help her but she said it made no difference and she had to give that thing to me anyway.'* (IDI 1/2007, F, 36 y.o., basic vocat. educ., homemaker, city 500-999K); *'I felt/ Dreadful, really dreadful. I refused to take part but that woman /interviewer/ gave me a gift anyway. /.../ If she had tried to contact me again, by mail, or even by leaving her phone number, I would have contacted her back for sure.'* (IDI 8/2007, F, 28 y.o., univ. educ., acad. researcher, city 200-499K). This shows that during the introductory speech the interviewers should first try and encourage the sampled person to accept the gift (as this will create a sense of obligation) instead of trying to obtain quick consent.

Nevertheless, our earlier experience as well as comments made by the respondents in connection with gifts indicate that great care must be exercised when selecting the gifts for a survey. The primary consideration is that the gifts should be useful for the respondent and, which is an increasingly common expectation, they should create a favourable aesthetic impression. The actual value of the gift plays a secondary role (see also Brennan 2010, Brennan et al. 2007).

### **Efekt materiálních stimulov v prieskumoch typu „face to face“. Skúsenosti v rámci Európskej sociálnej sondy v Poľsku**

Tento príspevok je zameraný na vplyv materiálních stimulov v rámci prieskumov typu „face to face“. Zamerali sme sa na skúsenosti s projektom ESS v Poľsku. Poľskí respondenti sú vo svojich stanoviskách týkajúcich sa materiálních stimulov (darčiekov) v prieskumoch rozdelení na 2 skupiny. Tieto postoje sú určené dvoma typmi motivácie. Niektoré odpovede poukazujú na to, že účasť vo výskumoch je videná ako druh „služby verejnosti“, ktorá by nemala byť odmeňovaná. Iné názory v našom príspevku poukazujú na to, že respondenti v Poľsku očakávajú nejaký druh odmeny v súvislosti s účasťou v prieskume.

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[1] The response rate in ESS is computed by deducting the ineligible from the selected sample. In the case of the sample used in Poland, ineligible cover situations when the respondent had deceased, the address was not occupied by the respondent (unoccupied/demolished/not yet built), the respondent had emigrated/left the country for a long period of time or when the respondent resided in an institution (cf. 'European Social Survey, Round 5. Specification for participating countries', downloadable from [www.europeansocialsurvey.org](http://www.europeansocialsurvey.org))