Using Behavioural Insights to Increase Survey Response Rates

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Irish Tax and Customs

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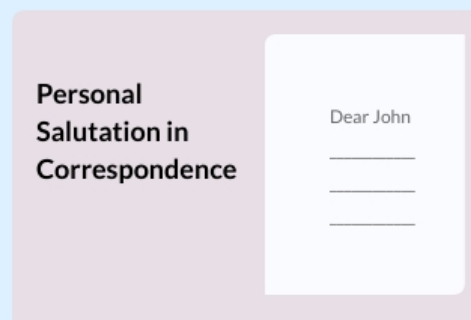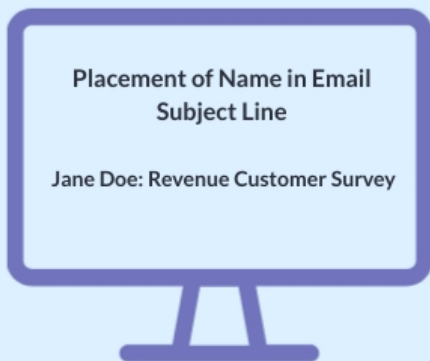Irish Government Economic & Evaluation Service

Using Behavioural Insights to Increase Survey Response Rates

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Using Behavioural Insights To Increase Survey Response Rates

Revenue Surveys		Behavioural Insights	
Improve Customer Service	Assist Tax & Duties Collection	Costless Application	Straight Forward to Apply

Personalisation Increases Response Rate

Placement of Name in Email Subject Line

Jane Doe: Revenue Customer Survey

Personal Salutation in Correspondence

Dear John

Executive Summary

Revenue carries out annual, large scale customer surveys. The objective is to use the opinions expressed in the surveys to improve the services offered by Revenue and to assist in the fair and efficient collection of taxes and duties. With a higher response rate to its customer surveys, Revenue can gather a wide range of representative feedback from taxpayers to use when considering how best to achieve its objectives of creating a customer service which can facilitate voluntary compliance.

Revenue's use of online surveys can facilitate administratively straightforward and costless behavioural interventions which have been demonstrated to raise response rates. This report collates the findings from randomised controlled trials ("RCTs") carried out as part of the Small and Medium sized Enterprises ("SME") online survey in 2017 and Chargeable Persons online survey in 2018.

The 2017 RCT found that the use of personalisation led to significant changes in survey response rates. In particular, using a taxpayer's first name in the email content (e.g., Dear John rather than Dear Customer) significantly increased response rates. Building on this, the 2018 RCT integrated specific forms of personalisation into email subject lines and found that name placement led to significant improvements in survey response rates (beginning the subject line with a name, e.g., Jane Doe: Revenue Customer Survey).

While specific behavioural interventions can be shown to have an impact in isolation, this analysis also demonstrates that survey response rates are consistently higher when multiple behavioural interventions are simultaneously used. This highlights the importance of considering several behavioural interventions when communicating with taxpayers.

These RCTs also highlight that this is a process which can be continually refined and improved upon, with previous findings informing the path for future research ideas.

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1 Introduction

Revenue carries out annual, large scale customer surveys. The objective is to use the opinions expressed in the surveys to improve the services offered by Revenue and to assist in the fair and efficient collection of taxes and duties.

High survey response rates are important for ensuring a wide range of customer feedback is gathered and that views expressed are representative of the wider taxpayer population.

Recent Revenue surveys have been carried out electronically. These online surveys provide a useful opportunity for carrying out randomised controlled trials ("RCTs") designed to test whether behavioural insights can increase survey response rates.

This report discusses the RCTs implemented as part of an online survey of Small and Medium sized Enterprises ("SMEs") in 2017 and an online survey of Chargeable Persons (self-employed individuals) in 2018.[1,2] While the surveys, and the RCTs, are conducted with slightly different cohorts of taxpayers, the results are relatively consistent. The survey results suggest that both groups hold similar views of Revenue and that their compliance behaviour and interactions with Revenue are influenced by the same factors.

The following section describes the design of the RCTs. Section 3 and 4 discuss the results of the 2017 and 2018 RCTs. Section 5 concludes.

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[1] https://www.revenue.ie/en/corporate/documents/research/sme-survey-2017.pdf
[2] https://www.revenue.ie/en/corporate/documents/research/survey-chargeable-persons-2018.pdf

2 RCT Design

The methodologies and results of all Revenue surveys are fully documented in the published summary reports. This report focuses on the RCT methodology and design.

2.1 Randomisation

In a Revenue survey RCT, taxpayers selected for the survey are randomly assigned to a treatment group, which might, for example, be emailed a personalised invitation to complete the survey, or a control group, which might receive a non-personalised email. The groups are then compared over a period on a specific and pre-defined outcome measure, such as the survey response rate, to test whether the groups' outcomes are different on average. Provided the sample size is sufficiently large, randomisation ensures that the two groups are comparable in every respect except that one received a particular treatment while the other did not. This means that any difference in outcomes is attributable to a specific behavioural intervention, and not to any other influencing factors.

The RCT design used in both surveys consists of five randomly assigned groups: one control group and four treatment groups. Four treatment groups were used, with different combinations of interventions applied, to facilitate testing the effectiveness of specific behavioural interventions. These groups were balanced, with approximately 1,000 individuals in each group creating a total RCT sample of 5,000 individuals.

2.2 Issuing the Surveys

Both surveys were conducted online using the survey software Qualtrics. An email was issued to each taxpayer in the randomly chosen sample, inviting them to provide feedback to Revenue by participating in the survey. Each email contained a personalised link to the survey which allowed responses to be measured. Taxpayers were assured of the confidentiality of responses and that the survey would be used for research purposes only.

Each survey was carried out over a six-week period. The SME survey was carried out from 4 September 2017 to 15 October 2017, while the Chargeable Persons survey was carried out between 26 November 2018 and 31 December 2018. In both surveys, two reminder emails were issued to survey recipients who had not yet responded.[3]

2.3 2017 Behavioural Treatments

For the SME survey in 2017, the RCT aimed to test the behavioural insights of *personalisation* and *authority*. Examples of these behaviourally informed emails are

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[3] These reminder emails retained the behaviourally informed treatment of the original email invitation.

attached in Appendix 1. These behavioural interventions applied to both the content of the email and the email subject line and are detailed in Table 1.

Table 1: 2017 Design

Group	Behavioural Intervention	Example
Control	-	Customer Survey: Invitation to provide feedback to Revenue Dear Customer
Treatment 1	Personal Salutation	Customer Survey: Invitation to provide feedback to Revenue Dear John
Treatment 2	Personal Salutation + Personal Subject Line	Customer Survey: To Mr. John Doe - Invitation to provide feedback to Revenue Dear John
Treatment 3	Personal Salutation + Personal Subject Line + Digital Signature	Customer Survey: To Mr. John Doe - Invitation to provide feedback to Revenue Dear John Signed: Keith Walsh
Treatment 4	Personal Salutation + Personal Subject Line + Digital Signature + Authoritative Sign-off	Customer Survey: To Mr. John Doe - Invitation to provide feedback to Revenue Dear John Signed: Dr. Keith Walsh, Head of Branch

Source: Revenue analysis.

2.4 2018 Behavioural Treatments

For the survey of Chargeable Persons in 2018, the RCT focused on the subject line of the email and the different forms of *personalisation* which can be applied to it. The content of the email remained constant across all RCT groups, while the subject line of the email varied across four different treatment groups.

This approach was taken due to the insights gleaned from the 2017 RCT, discussed in greater detail below, which found that personal salutations in the email content significantly increased response rates, authoritative sign-offs significantly decreased response rates and a personalised subject line had no effect. In light of this, the 2018 RCT applied the first intervention (of personalised salutations in the email content) to all RCT groups, on the assumption it would positively influence response rates to the survey. Treatment groups examined whether specific forms of personalised subject line could increase response rates further.[4]

Table 2 outlines the behavioural intervention treatment by each RCT group in 2018. Examples of the behaviourally informed emails are attached in Appendix 2.

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[4] However, the 2018 RCT used both the first and second name in the email content, rather than solely the first name as was applied in the 2017 RCT, in order to assist any potential tax agents in passing on the survey email to the originally appended taxpayer.

Table 2: 2018 Design

Group	Behavioural Intervention		Example of Email Subject Line
	Name	Subject Order	
Control	First and Second Name	Subject: Name	Revenue Customer Survey: Invitation to Jane Doe to provide feedback to Revenue
Treatment 1	First and Second Name	Subject: Name	Revenue Customer Survey: Jane Doe
Treatment 2	First and Second Name	Name: Subject	Jane Doe: Revenue Customer Survey
Treatment 3	First Name Only	Subject: Name	Revenue Customer Survey: Jane
Treatment 4	First Name Only	Name: Subject	Jane: Revenue Customer Survey

Source: Revenue analysis.

The subject line treatments were replicated for the subsequent reminder and final reminder emails. However, for the first email reminder, subject lines were prefixed with "Reminder – *[original subject line]*", with the final email reminder subject line email being prefixed with "Final Reminder – *[original subject line]*". As such, the cumulative effects of being exposed to different types of subject lines over the entire survey period are tested. This implicitly assumes that there is no permanent impact to any of the treatments.

Two limitations of the RCTs are important to mention. First, while the numbers of queries regarding the survey was an extremely low proportion of the sample, it could potentially be the case that corresponding with the survey respondents may have increased their likelihood of answering the survey (e.g., due to feelings of reciprocity). Second, the extent to which an entire email subject line is shown can be dependent on the device, or browser, or email setting in which it is read on. As such, there may be considerable variation within each of the groups regarding the length of the subject line shown. However, this variation is assumed to be random across and within the RCT groups, and as such, that it is not correlated with a potential survey respondent's propensity to participate and provide feedback to a survey.

3 RCT Results 2017

Table 3 shows the number of successfully delivered emails for the 2017 survey. The response rate is measured as the proportion of survey respondents who clicked on the survey link, out of the total number of successful emails delivered. It is important to note that this includes *all* survey respondents who have clicked on the link to open the survey, and, as such, is independent of an individual's survey completion rate, and whether they officially submitted a response (as opposed to simply clicking the survey closed).

Table 3: Successfully Delivered Emails 2017

	Control Group	T 1	T 2	T 3	T 4	Total
Number Emails Sent	999	990	994	944	1,092	5,019
Number Emails Delivered	962	956	964	871	1,049	4,802
Successful delivery rate (%)	96.3	96.6	97.0	92.3	96.1	95.7

Source: Revenue analysis.

The overall response rate across all groups is 24 per cent. Figure 1 displays the cumulative response rates for each of the 2017 RCT groups over the entire survey period. Treatment 3, which includes the use of personal salutation, personal subject line and digital signature, yields the highest response rate at 29.5 per cent. In contrast to this, the control group, which received the standard non-personalised email, had a cumulative response rate of 17.3 per cent. This suggests a 12.2 percentage point difference in response rates attributable to behavioural interventions.

Figure 1: Cumulative Response Rates 2017
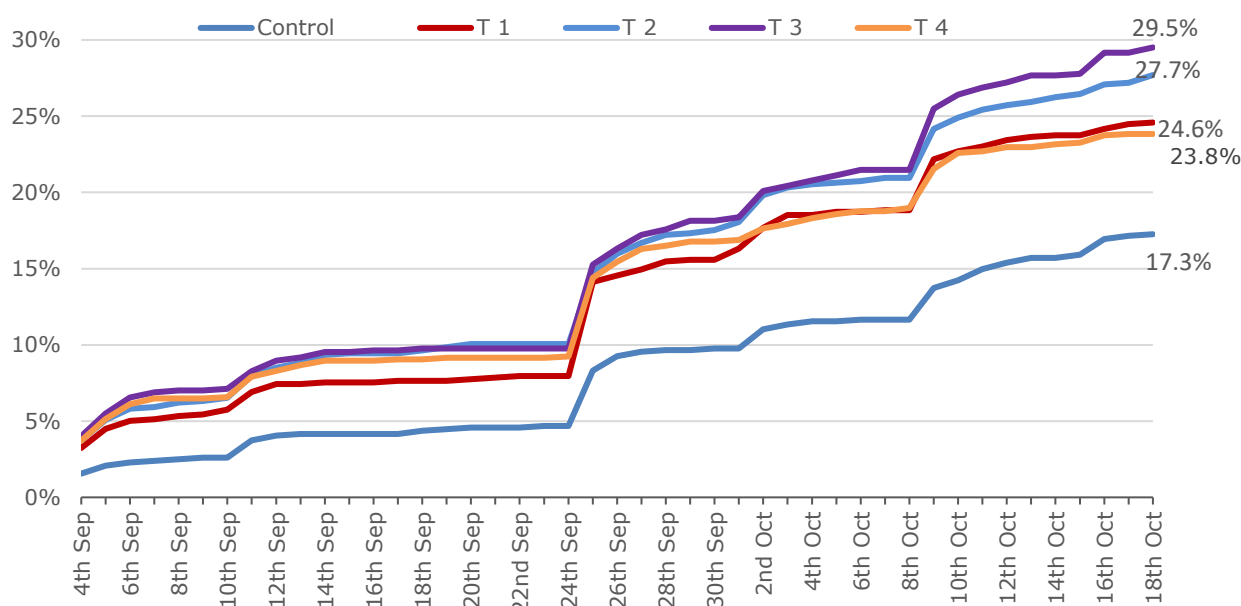
Source: Revenue analysis.

These differences in response rates can be examined using an odds ratio (Table 4). An odds ratio is a relative measure of effect which compares the probability of responding in the presence of a given treatment to the probability of responding in the presence of the control intervention (i.e., the standard non-personalised email). For example, those in Treatment 1 are 1.56 times more likely to respond than those in the control group. The odds ratios for all four treatments are found to be statistically significant, meaning the observed effects are unlikely to be due to chance.

Table 4 also shows that the cumulative effect of multiple behavioural interventions can be considerable. For example, the magnitude of the treatment effects increase between Treatments 1 through 3, with those in Treatment 3 just over twice as likely to respond as those in the control group. Interestingly, a decrease in magnitude is observed for Treatment 4 which is suggestive of a potential negative effect occurring from an authoritative sign-off.

Table 4: Response Rates 2017

RCT Group	Number of Responses	Response Rate	Statistically Significant	Odds Ratio
Control	166	17%	-	-
Treatment 1	235	25%	***	1.56
Treatment 2	267	28%	***	1.84
Treatment 3	257	30%	***	2.01
Treatment 4	250	24%	***	1.50

Source: Revenue analysis. Note: *** $p<0.01$, **$p<0.05$, *$p<0.1$.

As shown in Table 4, the treatment groups have higher response rates, which are statistically significantly different to the control group. However, these results do not explain what the underlying mechanism behind the results might be. This is because some treatment groups (e.g., Treatment 3) have two or more behavioural interventions (e.g., personal salutation, personal subject line and digital signature). This makes it difficult to isolate which specific behavioural intervention (if any) is driving the results. Similarly, aggregated treatment response rates will conceal the magnitude and directional nature of specific behavioural interventions, alongside any potential synergistic effects stemming from the use of multiple behavioural interventions.

To obtain clear and specific behavioural insights it is therefore important to compare treatment groups which are similar in all regards, bar one behavioural intervention. This allows the specific impact of a behavioural intervention to be isolated and tested. The hypotheses of personal salutation, personal subject line, digital signature and authoritative sign off were formally tested using a binary logit model (which estimates the likelihood of

a response being recorded given an individual's RCT treatment). The results of these tests are shown in Table 5.

This table shows that just two behavioural interventions were found to be individually statistically significant. First the inclusion of a personal salutation (e.g., Dear John) was found to increase the likelihood of a response, with the odds of a response 1.56 times higher for those who received a personalised email compared to those who received the standard non-personalised email. Second, the use of an authoritative sign off was estimated to *decrease* the response rate with respondents 24.2 per cent less likely to respond than those who did not receive an authoritative sign-off. No significant differences in the response rates were observed for when a full name was included in the email subject line (Personal Subject Line) nor when a digital signature was used.

Table 5: Testing of Specific Behavioural Insight Hypotheses 2017

Behavioural Intervention	Test	Odds Ratio	Statistical Significance
Personal Salutation	Treatment I vs. Control	1.563	***
Personal Subject Line	Treatment 2 vs. Treatment 1	1.175	None
Digital Signature	Treatment 3 vs. Treatment 2	1.093	None
Authoritative Sign-Off	Treatment 4 vs. Treatment 3	0.758	***

Source: Revenue analysis. Note: *** $p<0.01$, **$p<0.05$, *$p<0.1$.

The findings from the 2017 RCT suggest that personalisation and authority are the only isolated behavioural interventions to significantly alter response rates independently. All treatment groups with one or more behavioural interventions return significantly higher percentage response rates, ranging from 23.8 to 29.5 per cent. The combination of behavioural interventions which induced the highest response rates was Treatment 3 (Personal Salutation + Personal Subject Line + Digital Signature) where respondents were just over twice as likely to respond than those who received no behavioural interventions. Overall the most effective behavioural intervention was the inclusion of a personal salutation. Other behavioural interventions did not appear to have statistically significant independent positive impacts on response rates.

The 2017 findings on personalisation are consistent with a 2013 RCT run by Revenue, which found that personalised post-it notes added to invitation letters increased survey response rates significantly for an SME survey.[5] However, as acknowledged in a recent meta-analysis of Revenue RCTs, such a form of personalisation would be administratively

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[5] https://revenue.ie/en/corporate/documents/research/business-survey-2013.pdf

difficult to implement generally.[6] Personal salutations in emails, on the other hand, represent a costless way of improving survey response rates.

However, a more recent RCT, designed in a 2015 survey of PAYE taxpayers, found no evidence of increased survey response rates associated with the use of a personal salutation (e.g., Dear Mr. Doe) in the invitation letter.[7] . This may be due to distinct features of PAYE taxpayers compared to SME taxpayers, but Table 5 above suggests the lack of response may also be due to the use of only one form of personalisation in that letter campaign.

Finally, it should be noted that an authoritative sign-off was shown to have a negative impact on response rates. This could potentially relate to the implied threat conveyed which could reduce an individual's willingness to engage. This could have interesting implications for Revenue, particularly in the areas of audit and compliance.

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[6] https://revenue.ie/en/corporate/documents/research/applying-behavioural-science.pdf
[7] https://revenue.ie/en/corporate/documents/research/applying-behavioural-science.pdf

4 RCT Results 2018

Table 6 show the number of successfully delivered emails for each survey. The overall response rate, the proportion of the survey respondents who clicked on the survey link out of the total number of successful emails delivered, is 31 per cent.

Table 6: Successfully Delivered Emails 2018

	Control Group	T 1	T 2	T 3	T 4	Total
Number Emails Sent	1,000	1,000	1,000	1,000	1,000	5,000
Number Emails Delivered	964	972	975	969	961	4,841
Successful delivery rate (%)	96.4	97.2	97.5	96.9	96.1	96.8

Source: Revenue analysis.

The final response rates for each of the 2018 RCT groups are shown in Table 7 and Figure 2. The control group has the lowest response rate of 27.07 per cent. Higher response rates are observed in the treatment groups, with Treatment 2 recording the highest response rate at 35.18 per cent. The difference in response rates is statistically significant for Treatments 2-4, with those in Treatment 2 estimated to be 1.46 times more likely to record a response than those in the control group.

Figure 2: Cumulative Response Rates 2018
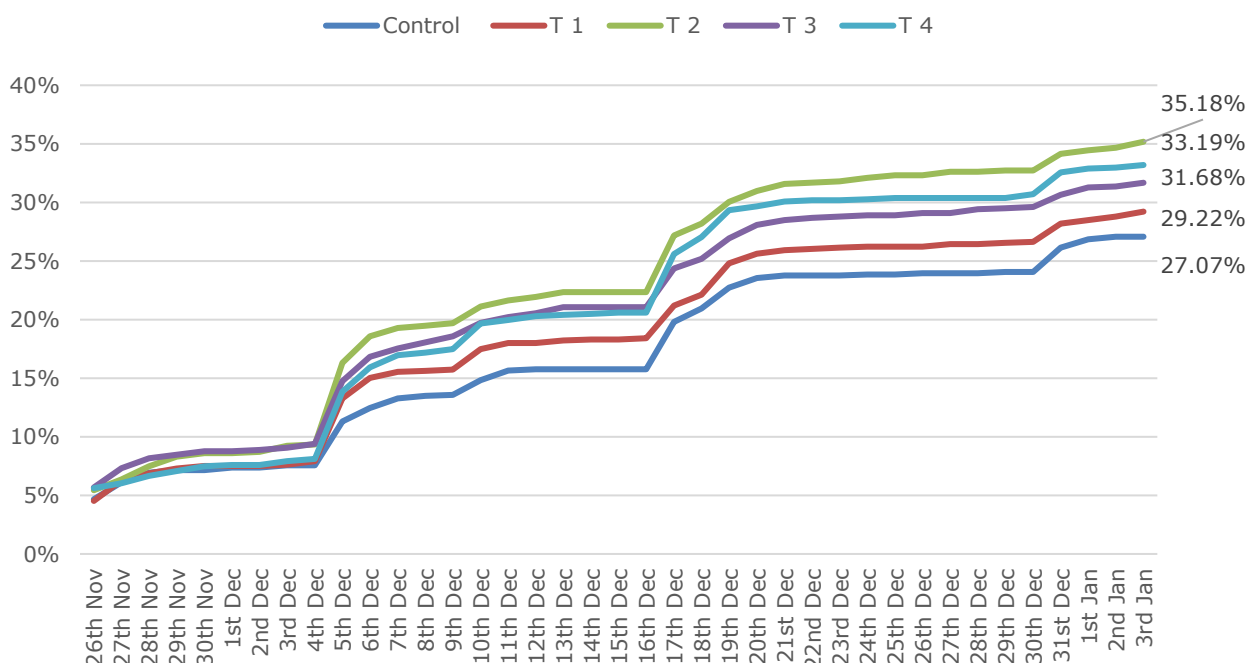
Source: Revenue analysis.

Table 7: Response Rates 2018

RCT Group	No. Responses	Response Rate	Statistically Significant	Odds Ratio
Control	261	27.07%		
Treatment 1	284	29.22%	No	-
Treatment 2	343	35.18%	***	1.46
Treatment 3	307	31.68%	**	1.25
Treatment 4	319	33.19%	***	1.34

Source: Revenue analysis. Note: statistically significant difference in response rates between control group and treatment group where P-values are indicated as: *p<0.1, ** p<0.05, ***p<0.01.

As suggested above, different behavioural interventions may have different impacts, both in terms of their magnitude and direction. To obtain clear and specific behavioural insights it is therefore important to compare treatment groups which are similar in all regards, bar one behavioural intervention. This allows the specific impact of a behavioural intervention to be isolated and tested. The hypotheses of simplification, personalisation and subject order were formally tested using a binary logit model (which estimates the likelihood of a response being recorded given an individual's RCT treatment).

Table 8: Testing of Specific Behavioural Insight Hypotheses 2018

Hypothesis	Test	Odds Ratio	Statistical Significance
Simplification	Treatment 1 vs. Control	1.11	None
Personalisation Type: use of first name	Treatment 3 vs. Treatment 1	1.12	None
	Treatment 4 vs. Treatment 2	0.92	None
Subject Order: placement of name	Treatment 2 vs. Treatment 1	1.31	***
	Treatment 4 vs. Treatment 3	1.07	None

Source: Revenue analysis. Note: P-values: ***p<0.01, ** p<0.05, *p<0.1

Table 8 shows that both simplification of the email subject line and a specific form of personalisation (use of first name versus first name and second name) are not shown to be statistically significant behavioural insights. In previous Revenue research, simplification of letters was associated with improved taxpayer compliance.[8] However, the context here is notably different as the simplification intervention applied to an email subject line rather than the full written correspondence, and the desired outcome was a positive survey response rather than taxpayer compliance. It is important to note that while these isolated behavioural interventions do not have a statistically significant impact individually, they are still found to have a considerable impact when combined and considered together (Table 7).

Only one behavioural intervention, subject order, is shown to be statistically significant on its own. The tests indicate that placing a person's full name first in a subject line, for

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[8] https://revenue.ie/en/corporate/documents/research/applying-behavioural-science.pdf

example "**Jane Doe:** Revenue Customer Survey", rather than at the end of the subject line, for example "Revenue Customer Survey: **Jane Doe**", will increase the odds of an individual responding by 31 per cent. This suggests placement and context are important aspects to account for when using personalisation in email subject lines. Interestingly the subject order finding was only found to hold for subject lines which used both a first name and surname. No statistically significant difference in response rates was found for subject order in which only a first name was used, for example "**Jane:** Revenue Customer Survey" rather than "Revenue Customer Survey: **Jane**". It is unclear why this might be the case, given the findings that using only a first name, rather than a first name and second name, has no estimated effect on response rates.

The 2018 RCT helps to demonstrate the importance of continuing to innovate and test for behavioural insights. As is shown in Table 8, many of these tests reveal findings which may appear counter intuitive. For example, the finding that individuals respond to subject order when their full name is used, but not when their first name is used, does not necessarily have an obvious behavioural rationale underpinning it. Similarly, the finding that respondents do not have a specific preference with regards to whether their first or full name is used does not strongly link to any recognised behavioural insights from the available research.

The findings of the 2018 RCT also highlight the continued importance of using behaviourally informed communication when interacting with taxpayers. As shown in Table 7, the aggregated effect of using behaviourally informed communication can be considerable. For example, the 8.1 percentage point difference in the response rate between Treatment 2 and the Control group translates to an extra 82 survey responses – at zero extra cost to Revenue.

5 Conclusion

This report collates the findings from RCTs carried out as part of the SME 2017 and Chargeable Persons 2018 Revenue customer research surveys.

With a higher response rate to its customer surveys, Revenue can gather a wide range of representative feedback from taxpayers to use when considering how best to achieve its objectives of creating a customer service which can facilitate voluntary compliance.

Revenue's use of online surveys can facilitate administratively straightforward and costless behavioural interventions which have been demonstrated to raise response rates. While specific behavioural interventions can be shown to have an impact in isolation (e.g., personalisation, authority, subject order), response rates are shown to be consistently higher when multiple behavioural interventions are simultaneously used.

Overall, the magnitude of these zero cost behavioural interventions is considerable and helps ensure that Revenue can carry out customer research surveys in an efficient and effective manner. These results also highlight that this is a process which can be continually refined and improved upon, with previous findings informing the path for future research ideas. As such, it is important that going forward Revenue continues to find innovative opportunities which can be exploited to test and discover new behavioural insights. The findings from these RCTS are also likely to have application to other Revenue communications with taxpayers.

Appendix 1 – 2017 RCT emails

Control – No element of Personalisation Applied

Customer Survey: Invitation to provide feedback to Revenue

September 2017

Dear Customer,

Revenue is conducting an online survey of small to medium sized businesses, to help us improve the quality of the service we provide to you.

We would like to hear your views, and I am therefore inviting you to complete our online survey at [link]. The survey should take 10 minutes to complete.

- Your responses will be treated in strict confidence and will be used for research purposes only.
- The survey does not ask for financial or personal information. Revenue will never ask for such information in emails or surveys.
- The survey is operated by Revenue through Qualtrics survey software. Responses will not be owned, visible to or used by Qualtrics or any other third party.
- A report on the overall survey results will be published on revenue.ie.

A notice confirming the veracity of this survey is posted on the News Section of revenue.ie. If you would like to clarify any aspect of the survey, please contact me at surveys@revenue.ie.

I hope you will take the time to complete this short survey before 15 October 2017 and thank you in advance for taking this opportunity to provide Revenue with your feedback.

Yours sincerely,

_____
Keith Walsh
Principal Officer
Revenue Commissioners

Treatment 1 – Personal Salutation

Customer Survey: Invitation to provide feedback to Revenue

September 2017

Dear John,

Revenue is conducting an online survey of small to medium sized businesses, to help us improve the quality of the service we provide to you.

We would like to hear your views, and I am therefore inviting you to complete our online survey at [link]. The survey should take 10 minutes to complete.

- Your responses will be treated in strict confidence and will be used for research purposes only.
- The survey does not ask for financial or personal information. Revenue will never ask for such information in emails or surveys.
- The survey is operated by Revenue through Qualtrics survey software. Responses will not be owned, visible to or used by Qualtrics or any other third party.
- A report on the overall survey results will be published on revenue.ie.

A notice confirming the veracity of this survey is posted on the News Section of revenue.ie. If you would like to clarify any aspect of the survey, please contact me at surveys@revenue.ie.

I hope you will take the time to complete this short survey before 15 October 2017 and thank you in advance for taking this opportunity to provide Revenue with your feedback.

Yours sincerely,

_____
Keith Walsh
Principal Officer
Revenue Commissioners

Treatment 2 – Personal Salutation + Personal Subject Line

Customer Survey: To Mr. John Doe - Invitation to provide feedback to Revenue

September 2017

Dear John,

Revenue is conducting an online survey of small to medium sized businesses, to help us improve the quality of the service we provide to you.

We would like to hear your views, and I am therefore inviting you to complete our online survey at [link]. The survey should take 10 minutes to complete.

- Your responses will be treated in strict confidence and will be used for research purposes only.
- The survey does not ask for financial or personal information. Revenue will never ask for such information in emails or surveys.
- The survey is operated by Revenue through Qualtrics survey software. Responses will not be owned, visible to or used by Qualtrics or any other third party.
- A report on the overall survey results will be published on revenue.ie.

A notice confirming the veracity of this survey is posted on the News Section of revenue.ie. If you would like to clarify any aspect of the survey, please contact me at surveys@revenue.ie.

I hope you will take the time to complete this short survey before 15 October 2017 and thank you in advance for taking this opportunity to provide Revenue with your feedback.

Yours sincerely,

_____

Keith Walsh
Principal Officer
Revenue Commissioners

Treatment 3 – Personal Salutation + Personal Subject Line + Digital Signature

Customer Survey: To Mr. John Doe - Invitation to provide feedback to Revenue

September 2017

Dear John,

Revenue is conducting an online survey of small to medium sized businesses, to help us improve the quality of the service we provide to you.

We would like to hear your views, and I am therefore inviting you to complete our online survey at [link]. The survey should take 10 minutes to complete.

- Your responses will be treated in strict confidence and will be used for research purposes only.
- The survey does not ask for financial or personal information. Revenue will never ask for such information in emails or surveys.
- The survey is operated by Revenue through Qualtrics survey software. Responses will not be owned, visible to or used by Qualtrics or any other third party.
- A report on the overall survey results will be published on revenue.ie.

A notice confirming the veracity of this survey is posted on the News Section of revenue.ie. If you would like to clarify any aspect of the survey, please contact me at surveys@revenue.ie.

I hope you will take the time to complete this short survey before 15 October 2017 and thank you in advance for taking this opportunity to provide Revenue with your feedback.

Yours sincerely,

Keith Walsh

_____
Keith Walsh
Principal Officer
Revenue Commissioners

Treatment 4 – Personal Salutation + Personal Subject Line + Digital Signature + Authority

Customer Survey: To Mr. John Doe - Invitation to provide feedback to Revenue

September 2017

Dear John,

Revenue is conducting an online survey of small to medium sized businesses, to help us improve the quality of the service we provide to you.

We would like to hear your views, and I am therefore inviting you to complete our online survey at [link]. The survey should take 10 minutes to complete.

- Your responses will be treated in strict confidence and will be used for research purposes only.
- The survey does not ask for financial or personal information. Revenue will never ask for such information in emails or surveys.
- The survey is operated by Revenue through Qualtrics survey software. Responses will not be owned, visible to or used by Qualtrics or any other third party.
- A report on the overall survey results will be published on revenue.ie.

A notice confirming the veracity of this survey is posted on the News Section of revenue.ie. If you would like to clarify any aspect of the survey, please contact me at surveys@revenue.ie.

I hope you will take the time to complete this short survey before 15 October 2017 and thank you in advance for taking this opportunity to provide Revenue with your feedback.

Yours sincerely,

Keith Walsh

_____

Dr. Keith Walsh
Head of Statistics and Economic Research Branch
Revenue Commissioners

Appendix 2 – 2018 RCT emails

Initial Email Invitation – Issued Monday 26th November 2018

Email Subject Line

Control
Revenue Customer Survey: Invitation to Jane Doe to provide feedback to Revenue

Treatment 1 (Simplification + First and Second Name)
Revenue Customer Survey: Jane Doe

Treatment 2 (Simplification + First and Second Name: Switched Subject Order)
Jane Doe: Revenue Customer Survey

Treatment 3 (Simplification + First Name only)
Revenue Customer Survey: Jane

Treatment 4 (Simplification + First Name only: Switched Order)
Jane: Revenue Customer Survey

Email Content

Dear Jane Doe,

Revenue is conducting an online survey of self assessed taxpayers, to help us improve the quality of the service we provide to you.

We would like to hear your views, and I am therefore inviting you to complete our online survey at Revenue Survey 2018.* The survey should take 10 minutes to complete.

- Your responses will be treated in strict confidence, will not be shared with your local tax office and will be used for research purposes only, to inform Revenue's ongoing work to improve our services.

- The survey does not ask for financial or personal information. Revenue will never ask for such information in emails or surveys.

- The survey is operated by Revenue through Qualtrics survey software. Responses will not be owned, visible to or used by Qualtrics or any other third party.

- A report on the overall survey results will be published on www.revenue.ie.

A notice confirming the veracity of this survey is posted on the news section of Revenue's website, www.revenue.ie.

If you would like to clarify any aspect of the survey, please contact me at surveys@revenue.ie.

If you are a tax agent, please forward this email on to your client named above.

I hope you will take the time to complete this short survey before 31 December 2018 and thank you in advance for taking this opportunity to provide Revenue with your feedback.

Yours sincerely,

_____
Keith Walsh
Principal Officer
Statistics & Economic Research
Revenue

*Or copy and paste the URL below into your internet browser:

First Reminder Email – Issued Wednesday 5th December 2018

Email Subject Line

Control
Reminder - Revenue Customer Survey: Invitation to Jane Doe to provide feedback to Revenue

Treatment 1 (Simplification + First and Second Name)
Reminder - Revenue Customer Survey: Jane Doe

Treatment 2 (Simplification + First and Second Name: Switched Subject Order)
Reminder - Jane Doe: Revenue Customer Survey

Treatment 3 (Simplification + First Name only)
Reminder - Revenue Customer Survey: Jane

Treatment 4 (Simplification + First Name only: Switched Order)
Reminder - Jane: Revenue Customer Survey

Email Content

Dear Jane Doe,

I recently emailed inviting you to participate in our survey of self assessed taxpayers, to improve the quality of the service we provide to you.

A large number of responses have already been received.

You can complete the survey by clicking the link here*.

The survey takes about ten minutes to complete and is confidential. Your responses will only be used for research purposes.

We appreciate your views and look forward to your response by the 31st December 2018.

Yours sincerely,

_____
Keith Walsh
Principal Officer
Statistics & Economic Research
Revenue

*Or copy and paste the URL below into your internet browser:

Final Reminder Email – Issued Monday 17th December 2018

Email Subject Line

Control
Final Reminder - Revenue Customer Survey: Invitation to Jane Doe to provide feedback to Revenue

Treatment 1 (Simplification + First and Second Name)
Final Reminder - Revenue Customer Survey: Jane Doe

Treatment 2 (Simplification + First and Second Name: Switched Subject Order)
Final Reminder – Jane Doe: Revenue Customer Survey

Treatment 3 (Simplification + First Name only)
Final Reminder - Revenue Customer Survey: Jane

Treatment 4 (Simplification + First Name only: Switched Order)
Final Reminder - Jane: Revenue Customer Survey

Email Content

Dear Jane Doe,

I recently emailed reminding you of the opportunity to participate in our survey of self assessed taxpayers, to improve the quality of the service we provide to you.

A large number of responses have already been received.

You can complete the survey by clicking the link here*.

The survey takes about ten minutes to complete and is confidential. Your responses will only be used for research purposes.

Your final opportunity to respond is approaching as we will close the survey after 31 December 2018.

Wishing you a Merry Christmas and a Happy New Year.

Yours sincerely,

_____
Keith Walsh
Principal Officer
Statistics & Economic Research
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