Qualitative Testing for Official Establishment Survey Questionnaires

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Outline

- An international survey of NSIs
- Recommendations vs. practices of qualitative testing:
  - Design
  - Sampling
  - Data collection
  - Data capture and analysis
  - Reporting and beyond
- Conclusions

International Survey of Qualitative Testing Practice for Business and Establishment Surveys
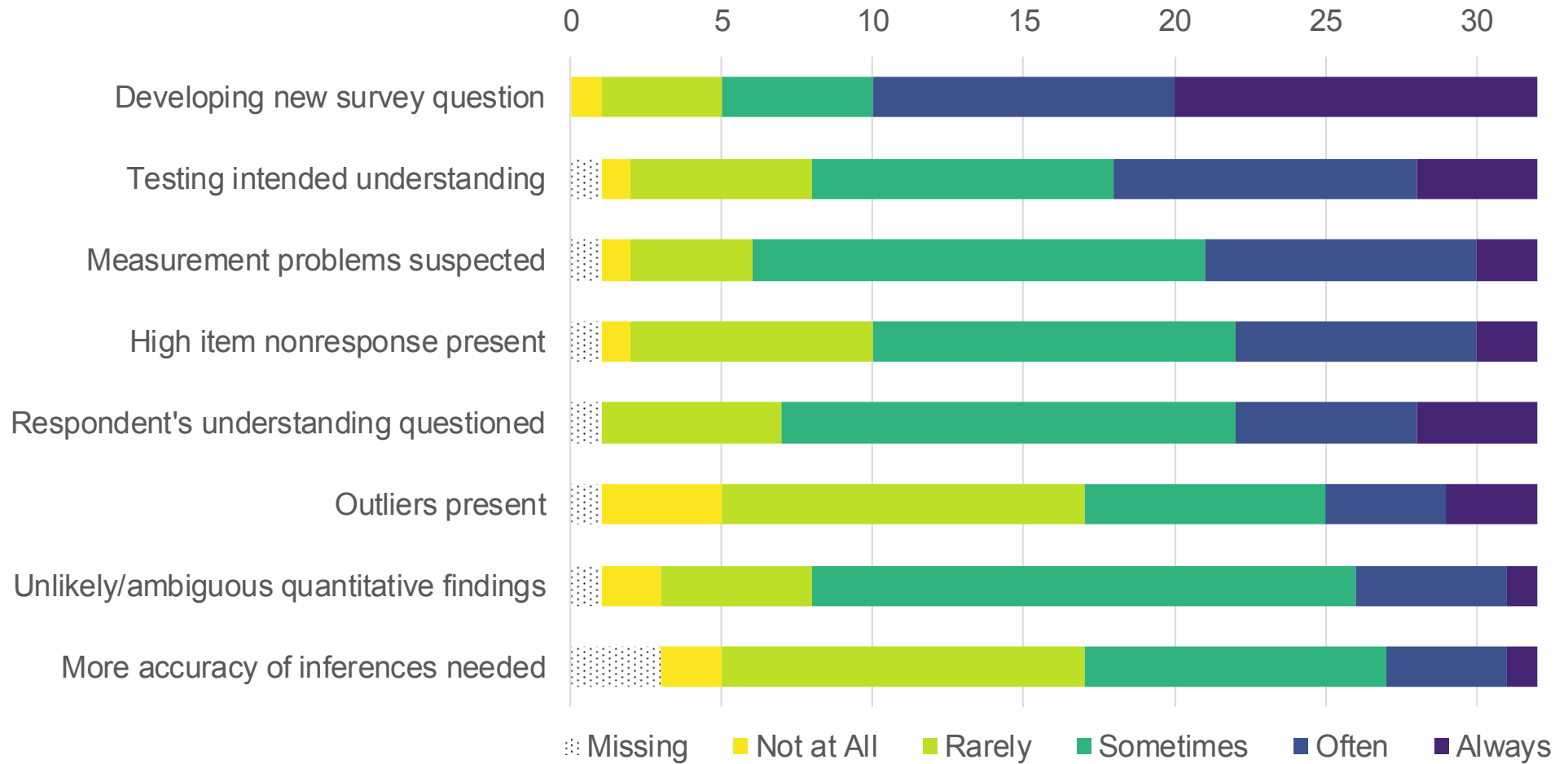
- Establishment survey about establishment surveys
- **Purpose:** Understand use of qualitative testing methods in statistical organizations for question and questionnaire evaluation in establishment and business surveys
- Web survey of National Statistical Institutes/Agencies, registered members ISI.
    - Initial N=232 from 215 countries
    - Contact established with 95 NSIs
    - 90 of these conduct establishment surveys
    - 53 of 90 report qualitative testing
    - 32 of 53 sufficiently complete responses: 3 Africa; 1 Asia; 14 Europe; 3 Latin America and the Caribbean; 9 North America ; 2 Oceania.

Use of qualitative methods in questionnaire development

- *Pre-test new components of a survey with qualitative methods*
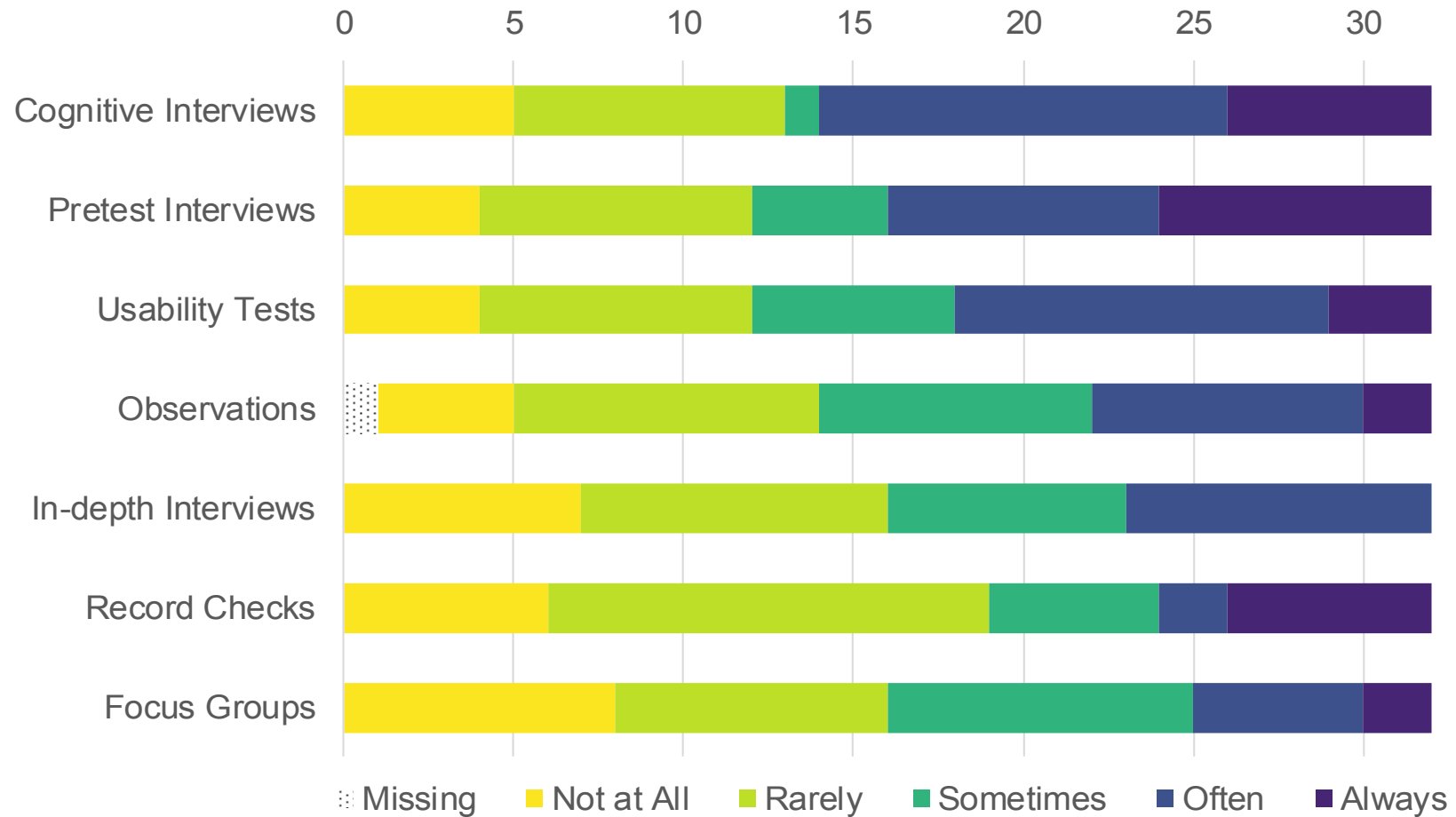
Qualitative research conducted when...

Chart categories (y-axis):
- Developing new survey question
- Testing intended understanding
- Measurement problems suspected
- High item nonresponse present
- Respondent's understanding questioned
- Outliers present
- Unlikely/ambiguous quantitative findings
- More accuracy of inferences needed

x-axis: 0, 5, 10, 15, 20, 25, 30

Legend: Missing, Not at All, Rarely, Sometimes, Often, Always

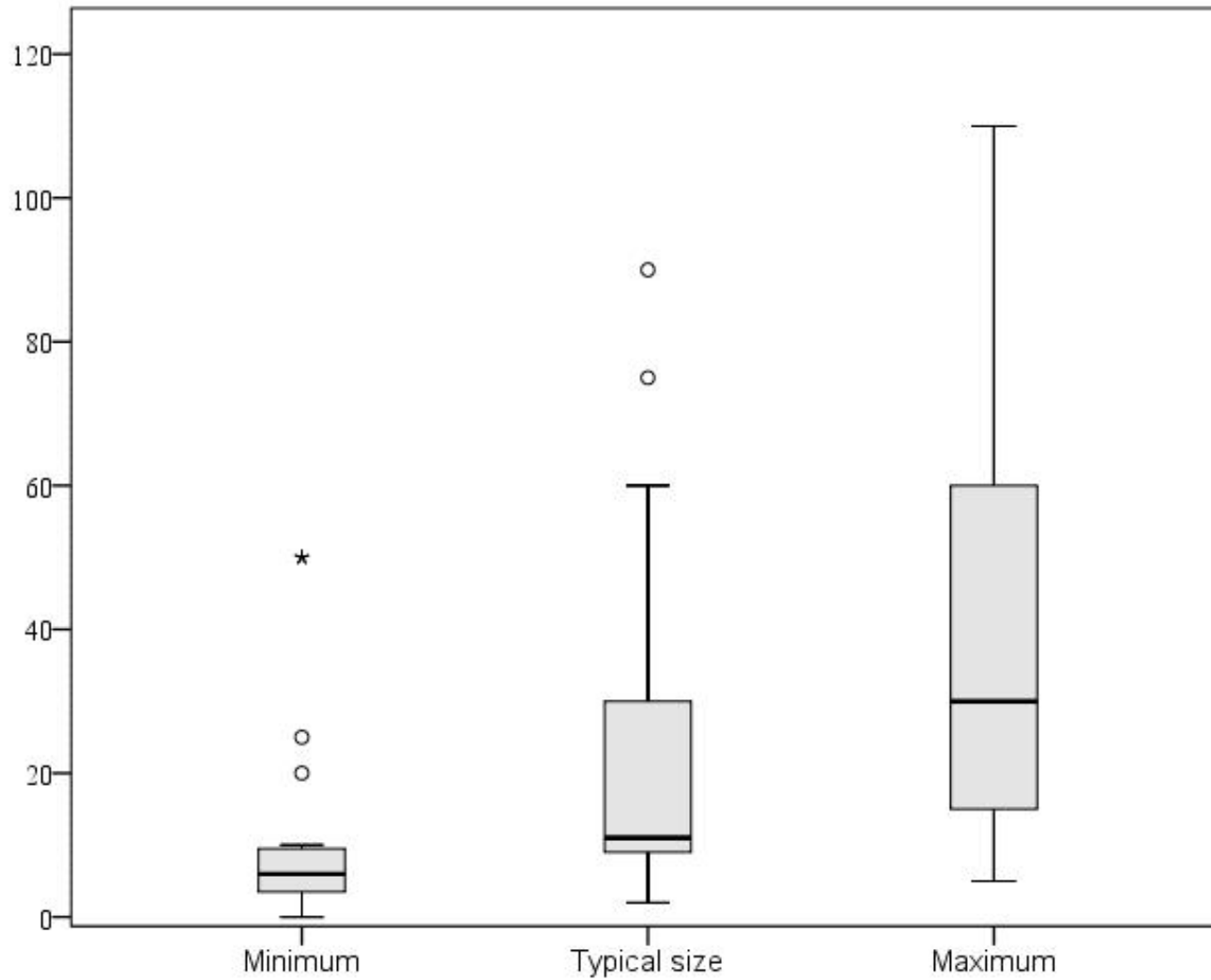# Overall design

- *Use more than one testing method*

Sampling and recruitment

- *Use sample sizes that allow saturation*
- *Sample for the greatest variety in as many relevant characteristics as possible*
- *Document sampling decisions, recruitment processes and outcome*
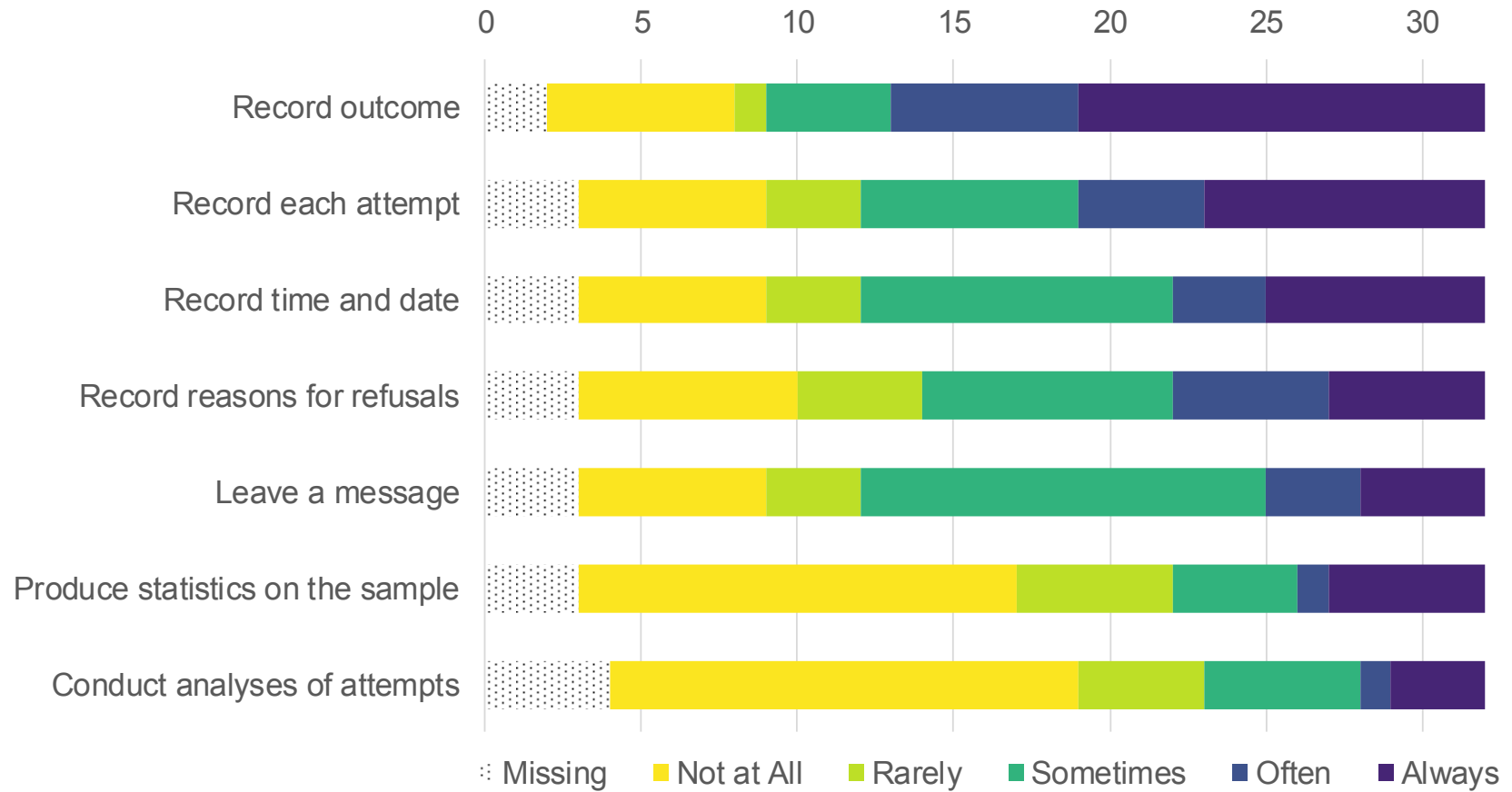- *Reflect on the achieved sample*

Icon by Gregor Črešnar from Noun Project

Sample sizes

Recruitment practices

Q27

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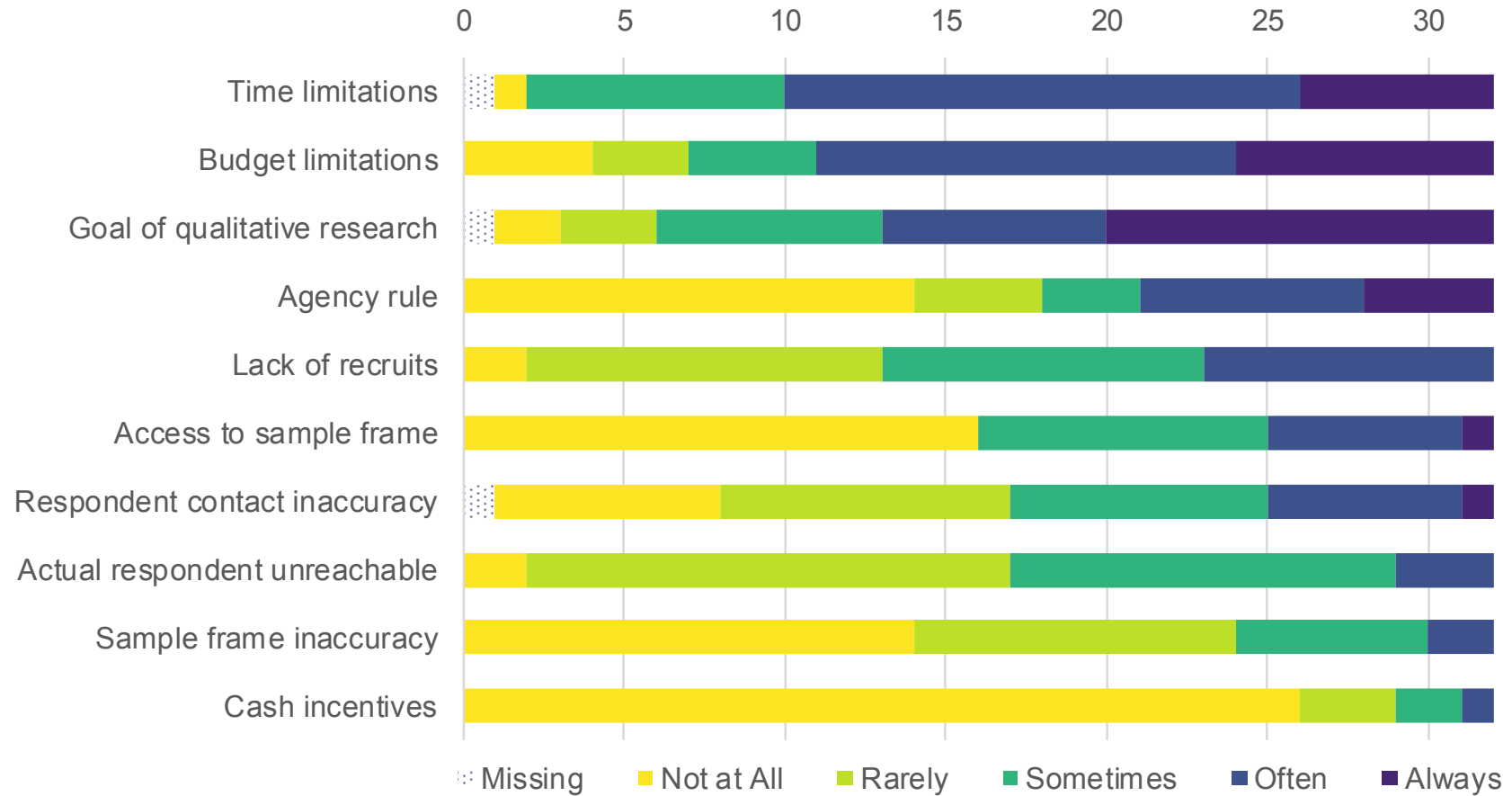
Data collection practices

- *Secure interviewer competences*
  - *Qualitative interviewing skills*
  - *Content matter knowledge*
  - *Knowledge about the goal of the testing*
- *Test as realistically as possible*
  - *Use observation and reconstruction of the response process*
  - *Test mixed-mode questionnaires in all relevant modes*

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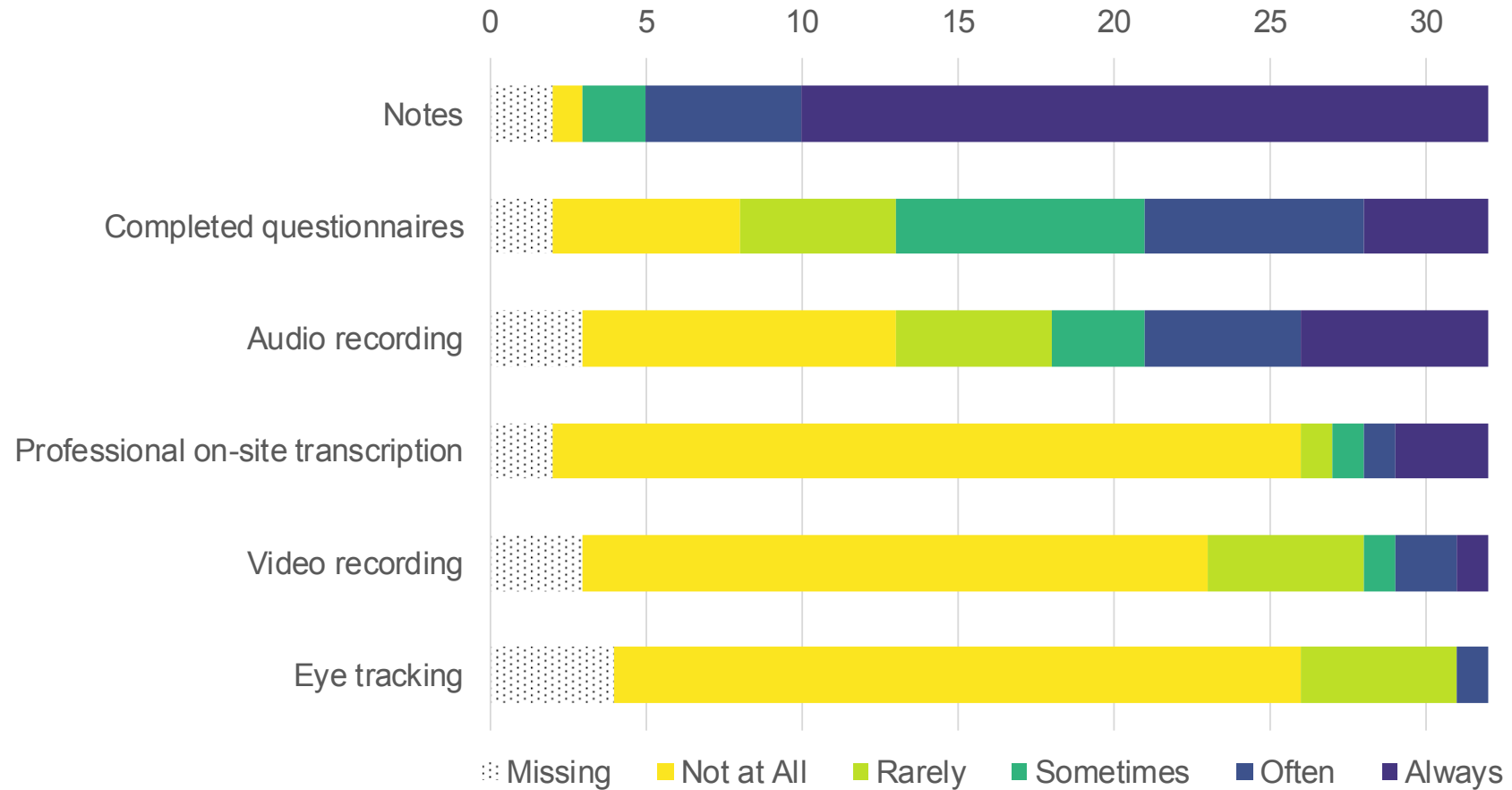# Use of some best data collection practices

Q34A, Q34F,
Q36B, Q35
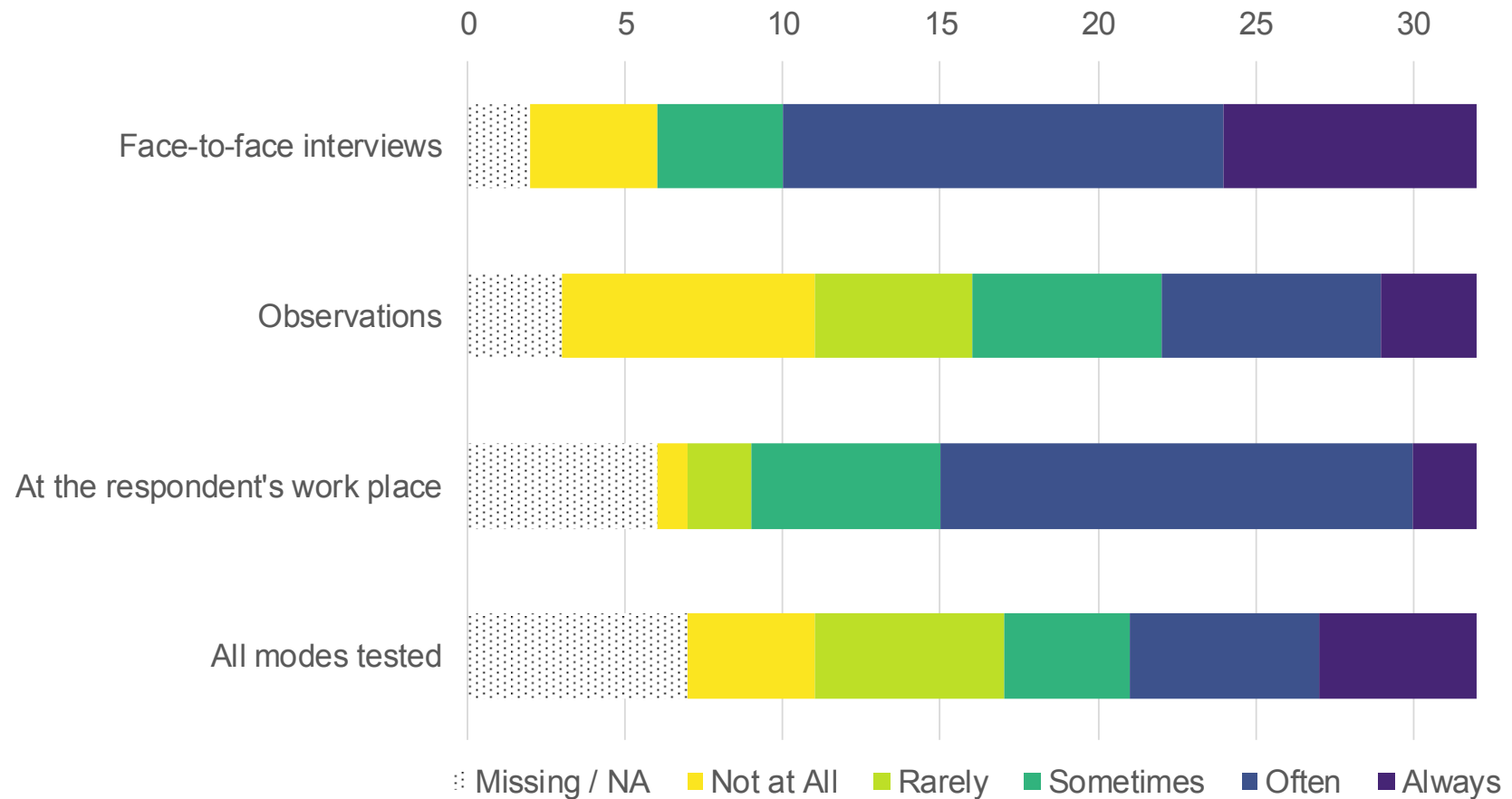
Capturing data

- *Capture data as naturally as possible by making video- or audio- recordings, or transcriptions*

Ways of capturing raw data

Legend: Missing, Not at All, Rarely, Sometimes, Often, Always

Categories: Notes, Completed questionnaires, Audio recording, Professional on-site transcription, Video recording, Eye tracking

Analyzing data

- *Summarize raw data in a structured and systematic way*
- *Involve more than one researcher in the analysis process*
- *Use or at least have access to raw data during analysis*
- *Analyze data not only by question but also by sources of measurement errors and by parts of the response process*

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Practices in analyzing data
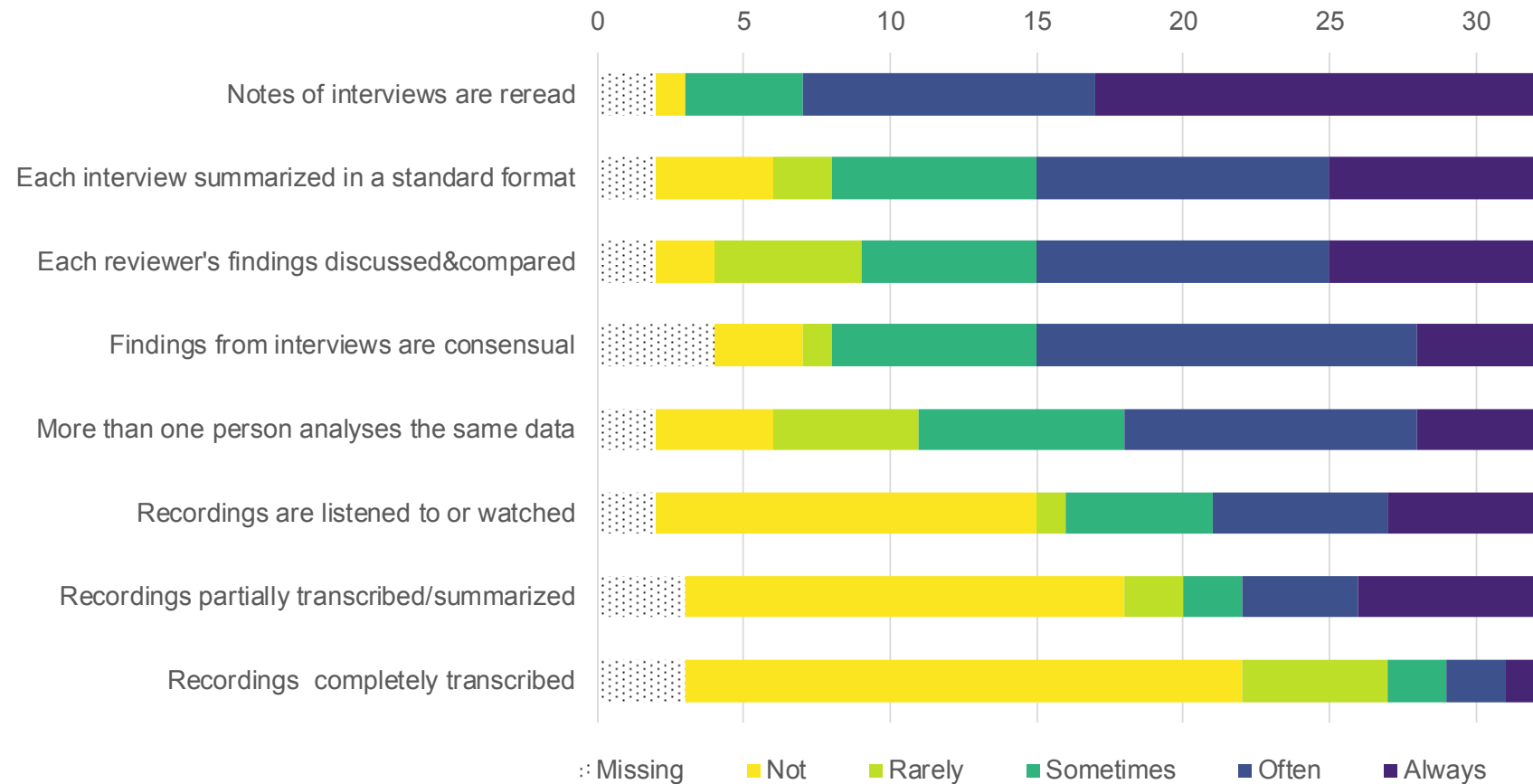
Ways of summarizing data
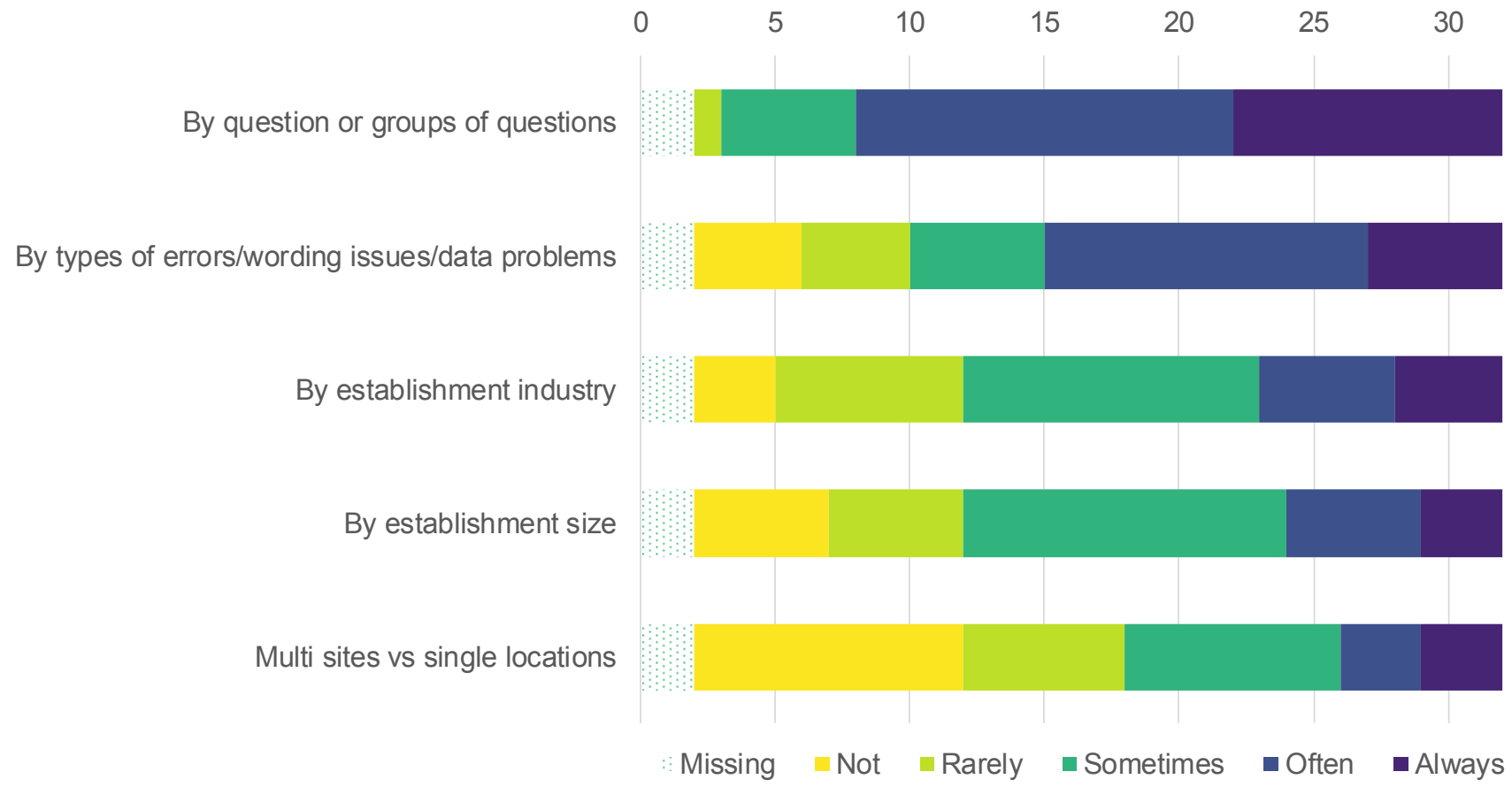
Reporting

- *Document study design and results*
- *Do this in a way that makes the research process and outcome traceable and understandable*

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What information is included in reports on establishment survey qualitative testing?

Cognitive Interviewing Reporting Framework (Boeije & Willis, 2013)	The International Survey of NSIs
Research objectives	
Research design	
Ethics	
Participant selection	Number of interviewed businesses Types of interviewed businesses
Data collection	How the data collected
Data analysis	How the interviewing data analyzed
Findings	
Conclusions, implications, and discussion	
Strengths and limitations of the study	
Report format	Tested questions/instrument Questions asked about tested questions

After recommendations

- *Follow up and document if and how recommendations were implemented*
- *Evaluate with field-work data how well the questionnaire worked in practice, and use this information to reflect on design and results of the pre-test*

What happens after recommendations?

- 27 of 31 NSIs report that recommendations are often/always implemented.

- 17 of 28 NSIs report they never or rarely use other data to check how correct the recommendations were.

Conclusion:
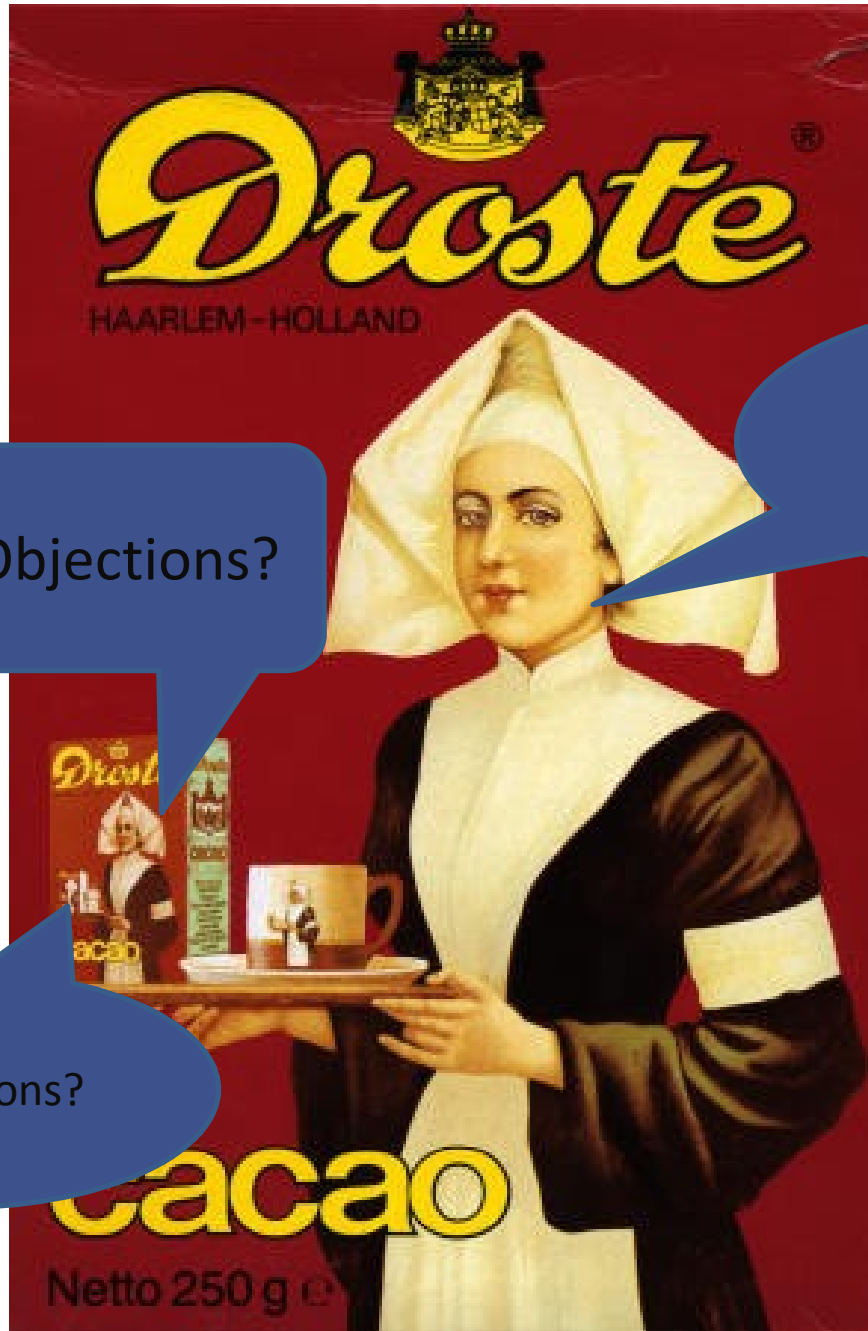# extent of using qualitative methods at all

- Difficult to get information on qualitative testing practices from NSIs worldwide.

- Qualitative methods not everywhere used as standard practice in establishment survey questionnaire development and evaluation.

Need for more promotion and eduction for using qualitative methods in questionnaire evaluation, also for businesses.

Conclusion: ways of using qualitative methods

- Lack of guidance on good practices
- To the extent available: many good practices followed, but room for improvement to increase quality and accountability of research process
  - Larger samples (probably)
  - Better documentation for recruitment practices
  - Better capture of data collection (e.g. audiotaping)
  - More in-depth analysis
  - More follow up/evaluation after testing project