Methodological Guidelines EVS2017
App A4: Mixed-Mode strategy

Related to the EVS 2017 integrated dataset ZA7500

The document contains recommendations and guidelines for the implementation of CAWI surveys for EVS2017, and it was prepared by the EVS Methodology Group.

After a brief Introduction, it outlines the main guidelines as concerns 1) Software; 2) Design; 3) Length of the survey (matrix design); 4) Procedure.

EUROPEAN VALUES STUDY 2017

MIXED-MODE STRATEGY GUIDELINES

Recommendations and guidelines for the implementation of the CAWI
version of the EVS 2017

MAY 2017

EVS and self administered surveys: some guidelines

Introduction

The general rules of EVS, described in the Methodological Guidelines, have opened the possibility of a web survey, in parallel to the Face to Face survey, on a couple of conditions, the most important being the sampling frame, that has to be the same as for the Face to face form.

For some countries, a mail format, after the web component, could be needed to increase the response rate and the diversity of respondents. As a general rule, if the response rate to the web part is expected to be lower than 40%, some measures in order to increase the final response rate have to be implemented. Of course this written format has to be as close as possible to the one used for the web.[1]

However, the questionnaire has to be adapted as it is usual in a mixed mode survey. The goal of this document is to give rules and advices about such adaptation as well as link to examples of implementation in order to help the countries in implementing a web survey

Software

There is plenty of software that can be used for a web survey and it is impossible for the EVS Methodology Group to support them all. An example has been implemented in LimeSurvey, which is open source and easy to install on a local server, but each country will be responsible for its implementation as well as translation in local languages.

Some points are important in the implementation process, independently of the software used:

- It is important to check that the server is secure and that the privacy of the respondent respected.

- It is important also to know where the servers are located and to be sure that the national laws about data protection are respected even if the servers are not physically located in the surveyed country.

- The software must be able to handle interruptions in the survey's response process and the respondent must be able to restore the session easily.

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[1] It depends of course of the management system used by the countries but to keep one version able to generate both the mail and the web format is wise, even more if different version are foreseen: translation or matrix design to mention some elements.

- The possibility to import a questionnaire, to export the one used, to produce eventually directly the mail version from the software.

- The format and modalities of exportation of the data are to be checked before the implementation.

- Counters of the time taken by parts of the questionnaire have to be implemented, details will be given later.

Design

Some general rules have to be observed:[2]

- Progress indicators are not allowed

- A "Back" button has to be provided, near the "Next" one.

- It must be possible to do the survey on a mobile device as a tablet or a smartphone and the design developed for a device in a "portrait" position. Paradata have to be collected, so as to detect the device used.

- Each question must be placed on a page and scrolling must be avoided as far as possible in order not to have primacy effects.

- "Batteries of questions" have to be avoided and replaced by "simple questions". In this case, consider visually maintaining the constant part and modifying only the part for each item. This is of course needed for mobile devices but could also be recommended in order to avoid lining or satisficing in the PC version. This should also be respected for the mail version. A few exceptions, in which grids have to be presented, will be pointed out.

- Use a simple and clear design and avoid underlining that can be confused with hyperlinks.

- The questionnaire must not propose explicitly a "Non response" option but must provide a reminder if a respondent does not answer a question.[3]

Length of the survey

With some 280 ticks, the EVS is a rather long survey for the web. It is therefore advised to make sure that it could interrupted as needed by the respondents. Furthermore, if it is applied in its full length, advance letters have to mention this aspect. Finally specific recalls have to be

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2   We use here the elements proposed for the Cronos web panel. Thanks to this initiative for providing these, also in the context of the SERISS project.

3   We propose a version inspired by Cronos: "We noticed that you did not answer this question. We would be very grateful if you answered to the best of your knowledge, even if you are not completely sure. But if you prefer not to answer to the question, you can continue the questionnaire."

prepared for people interrupting the answer process and not coming back after a decent delay. A file containing the history of contacts has to be provided.

As an alternative, Switzerland, and we encourage other countries to do the same, will choose a "matrix design". Let us consider the following design, dividing the survey into 4 blocks, aiming at overall around 2000 respondents, divided into 6 situations, S1 to S6.

Groups	Background	A	B	C	D
S1	333	333	333		
S2	333	333		333	
S3	333	333			333
S4	333		333	333	
S5	333		333		333
S6	333			333	333

- 2000 respondents overall,
1000 respondents for each substantive question;
at least 333 respondents for each binary combination of questions.

In such a design, each block will be answered by 1000 respondents and at least 333 answers could be mobilised for analysis between blocks.

A complementary approach that will be used in Switzerland, is to use a "mini-panel", coming back to the respondents of the matrix survey and asking them to fill in a second wave, the part that was not filled in the first wave.

For the countries choosing these options, an exchange of experiences will be organised. The format is function of the number of countries concerned.

Procedure

If you plan to use a mixed-mode strategy in your country, please inform the Methodology Group (evs2017mg@gmail.com) as soon as possible.