7th GESIS Summer School in Survey Methodology
Cologne, August 2018

Syllabus for short course A: “Pretesting Survey Questions"

Date: 2-3 August 2018
Time: 9:00-13:00, 14:00-16:00
Course starts Thursday morning at 9:00

About the lecturers:
Dr. Katharina Meitinger is a senior researcher at GESIS Leibniz-Institute for the Social Sciences, Mannheim, Germany since 2013 and is teaching at the chair for Statistics and Methodology at the University of Mannheim since 2016. Before joining GESIS, she completed her Master’s degree in Sociology at the University of Bamberg in 2012 and received her doctorate from the University of Mannheim in 2016. She was involved in cognitive pretests for the European Commission, SHARE, and RKI. Her research interests include web probing, equivalence assessment of survey items, and mixed methods approaches.

Dr. Timo Lenzner is a senior researcher at the cognitive pretesting unit at GESIS – Leibniz Institute for the Social Sciences. His main responsibilities include conducting cognitive pretests for large survey projects such as the ISSP, SHARE or PIAAC-L and carrying out research on questionnaire design and questionnaire evaluation methods.

Selected Publications:


Short Course Description:
The course highlights the general importance of carrying out (cognitive) pretests before fielding a questionnaire. This is achieved through both lectures and in-class exercises. In the lectures, we introduce different pretesting approaches and discuss examples of untested as well as pretested and improved survey questions. The in-class exercises familiarize participants with different pretesting methods. We cover several pretesting methods such as questionnaire appraisal systems, cognitive interviewing, eye tracking, and web probing and illustrate the
intricacies of conducting cross-cultural pretesting projects. We focus on the sorts of information gathered by these different pretesting methods and how the information can be used to reduce measurement error. In this context, we will also discuss the pros and cons of different pretesting methods and mixed-method approaches. Besides a more general introduction of the different pretesting approaches, participants will receive practical advice on how to conduct (cognitive) pretesting projects and how to decide which pretesting methods should be selected in a given research situation.

Keywords:
Pretesting, Questionnaire Evaluation, Cognitive Interviewing, Web Probing, Eye Tracking

Course Prerequisites:
- Basic knowledge in questionnaire design; however, some practical experience in conducting surveys will be beneficial.
- There are no statistical prerequisites.

Target Group:
Participants will find the course useful if:
- They develop their own questionnaires for own data collection
- They work in a survey organization and work on questionnaire design and evaluation
- Researchers that use survey data and wish to understand the importance of pretesting to reduce measurement error

Course and Learning Objectives:
By the end of the course participants will:
- Be familiar with current (cognitive) pretesting methods
- Know the pros and cons of the different approaches to test survey questions
- Be able to make an informed decision about when to use which pretesting method and the ways in which several methods can be combined within a pretesting project

Organizational Structure of the Course:
The course structure includes 6 hours of in-class instruction in the morning time and afternoon. After a lecture on each key topic and the presentation of the different pretesting approaches, there will be practical exercises. In addition, individual consultations are possible.

Software and Hardware Requirements:
None.

Long Course Description:
Before collecting new data, it is important to ensure that the questionnaire contains questions that are valid, reliable, and comparable. Therefore, an important stage in the data collection process is to conduct a pretest before fielding the questionnaire and starting the actual data collection. However, several pretesting approaches exist that address different aspects regarding the question assessment. This course wants to provide an overview over different qualitative pretesting approaches and to provide the participants with a guideline on how to select the optimal pretesting approach in a given research situation. In this course, we will combine lectures and in-class exercises.

On day one, we will start with a general introduction why it is necessary to conduct pretests, give a short overview over different pretesting approaches and locate the pretesting approaches in the framework of the Total Survey Error. After this general introduction, we will discuss several pretesting approaches in more detail. We will present the methods of Expert Review and Question Appraisal System and we will do an exercise
regarding these methods. However, the main focus of day 1 will be on the method of cognitive interviewing. We will introduce the method, discuss different approaches (e.g., probing vs. think-aloud), and techniques (e.g., different probe types). In addition, we will provide guidance on how to plan, conduct, and analyze cognitive interviews and we will do several exercises in this context. We will end day 1 with a presentation on eye tracking (i.e., the recording participants’ eye movements while they answer a questionnaire) and how it can be used to supplement cognitive interviewing.

The focus of day 1 will be on an assessment of national data. On day 2, we will extend the scope and we will focus on the assessment of cross-national data. Although pretesting cross-national questionnaires is crucial, the pretesting of cross-national data comes with several challenges in comparison to a national pretest (e.g., language issues, transferability of pretesting findings, etc.). We will start day 2 with a presentation that shows why cross-national pretests are important to ensure data quality, that discusses the challenges involved in cross-national pretests, and provides strategies to address these challenges. In addition, we will discuss the method of cross-cultural cognitive interviewing in more detail. In the second session of day 2, we will introduce the method of web probing. Web probing is the implementation of probing techniques from cognitive interviewing in web surveys. This allows for large sample sizes in pretesting and facilitates the data collection in multiple countries and increases the comparability of pretesting results. On the one hand, we will discuss methodological findings regarding the optimal implementation of web probing (e.g., visual design), on the other hand, we will provide guidance regarding the planning, conducting, and analysis of (cross-national) web probing studies. Additionally, we will show how to tackle the qualitative analysis of large sample sizes with mixed-methods approaches. The lecture on web probing will be supplemented by an exercise. In our last session, we will combine the previous information and focus on the question on how to decide which pretesting methods should be selected in a given research situation. We will systematically compare the advantages and disadvantages of the different pretesting approaches, present the findings of methodological studies comparing several approaches and we will do a scenario exercise in this context.

In addition to lectures and exercise, there will be the possibility of personal consultations.

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### Day-to-day Schedule and Literature:

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<tr>
<th>Day</th>
<th>Topic(s)</th>
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| 1   | Introduction  
- Reasons for conducting pretests and goals of pretesting  
- Overview over different pretesting methods  
- Locating pretests in the Total Survey Error Framework  
| Expert Review & Question Appraisal Systems + Exercise  
Suggested reading:  
| Cognitive Interviews  
- Planning & conducting cognitive interviews + Exercise  
- Analyzing cognitive interviews + Exercise  
Suggested reading:  
| Eye Tracking  
- Benefits of supplementing cognitive interviewing with eye tracking  
Suggested reading:  
| 2   | Pretesting of cross-national data:  
- Reasons for conducting pretests of cross-national data  
- Challenges of pretesting cross-national data: The additional layer of complexity  
- Cross-cultural cognitive interviews  
Suggested reading:  
Web Probing + Exercise
- Introduction to web probing
- Optimal implementation: Visual design, probe order, nonresponse reduction
- Planning & conducting web probing studies
- Analysing web probing studies
- Dealing with large sample sizes: Mixed Methods Approaches

Suggested reading:

Which method to choose? + Exercise
- Discussion of advantages and disadvantages of the different pretesting methods
- Presentation of methodological studies comparing several approaches
- Relevant factors for the selection of the appropriate pretesting approach in a given situation (scenario exercise)

Suggested reading:

Preparatory Reading:

Additional Recommended Literature:


