

Options for Pretesting Online Establishment Surveys

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Agenda

- Why Pretest
- Types of Pretesting
- Challenges in Pretesting
- Working with Prototypes



Why Pretest Surveys

■ Identify problems

- ▶ Language (confusing instructions, inappropriate jargon)
- ▶ Question order
- ▶ Skip patterns
- ▶ Inability to answer questions
 - Respondents don't have or can't remember information
 - Respondents' data are in different formats or structured around different constructs
- ▶ Usability issues

■ Fix problems or interpret data accordingly



Types of Pretesting

■ Cognitive Interviewing

- ▶ Look for issues with question wording, question order, data requested

■ Usability Testing

- ▶ Look for issues with navigation, survey features

■ Field Testing

- ▶ In addition to the issues above, field testing also looks for issues with implementation such as procedures or interview flow
- ▶ Sometimes includes A/B Testing



Focus
for
today

Challenges Testing Establishment Surveys

- Finding respondents to participate
 - ▶ Often need a specific person within an establishment
- Finding respondents who have time to participate
- Finding respondents who have time and want to participate



Recruiting Participants

■ Existing Respondents

- ▶ Focus on “friendly” respondents
- ▶ Risk overburdening them

■ Previous Respondents

- ▶ They may already be overburdened by your surveys

■ Potential Respondents

- ▶ May be hard to find and/or unfamiliar with your survey or agency

■ Other proxies

- ▶ Similar occupations, background, job descriptions (agency staff?)
- ▶ May also be hard to find

Recruiting Participants

- Start with a large sample
 - ▶ Our recent study got 2 participants from 50 emails
- Cast a wide net at first, consider tailoring later if needed.
- Consider input from field staff who know the respondents
- Follow best practices for inviting survey respondents



Motivating Participants

- Another Big Challenge
- Typically no monetary incentive
- Need to find other motivators
 - ▶ Being able to use the data published from the survey
 - ▶ Helping government agencies provide important information
 - ▶ Helping yourself and others like you
 - ▶ Provide assistance survey respondents need
 - ▶ Are there other motivators that work?



Conducting Pretests

■ In-person vs Remote

▶ In-person: Lab, field

- Lab testing is less frequent for establishment surveys

▶ Remote: Phone or web conferencing tools

■ Moderated vs Unmoderated

▶ Moderated: Speaking with the participant directly

▶ Unmoderated: Self-directed by participant on their own (need tools)

- May help with recruiting
- Unmoderated less frequent for cognitive interviews

Pandemic Considerations

- Most sessions will be remote for now.
- Participants and establishments may be overworked
 - ▶ OR they may have less work than usual, or even closing down
- Participants are likely juggling work/life responsibilities at home
- Schedule sessions throughout the day



Working with Prototypes

- Sharing prototypes in remote testing
 - ▶ Create prototype in an online survey tool
 - ▶ Share an HTML page or other document
 - On a “hidden” web page
 - ▶ Access your development site and share your screen
- Working with prototypes
 - ▶ Be careful with confidential data and third party services (e.g., web conferencing, unmoderated testing tools)
 - ▶ Use vignettes/scenarios to work with fake data



Summary

- Many reasons to conduct pretesting on surveys
- Types of testing
 - ▶ In-person vs remote
 - ▶ Moderated vs unmoderated
- Some challenges with establishment surveys
 - ▶ Finding and motivating participants
 - ▶ Sharing prototypes



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