

HOW ACTIVE SHOULD RESPONDENTS BE IN SMART SURVEYS? TWO CASE STUDIES

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Smart tasks?

Smart surveys may have at least one of the following 'smart' tasks:

1. Check and adjust (near) real-time predictions and other derivations made in-device
2. Operate internal sensors of the device
3. Link/import data from external sensor systems
4. Link and evaluate public online data
5. Collect, check, adjust and donate external personal data;
6. Consent to link external personal data in possession of the survey institute

How much respondent involvement and how strict?

ESTAT project Smart Survey Implementation (SSI) aims for a typology of tasks including quality metadata

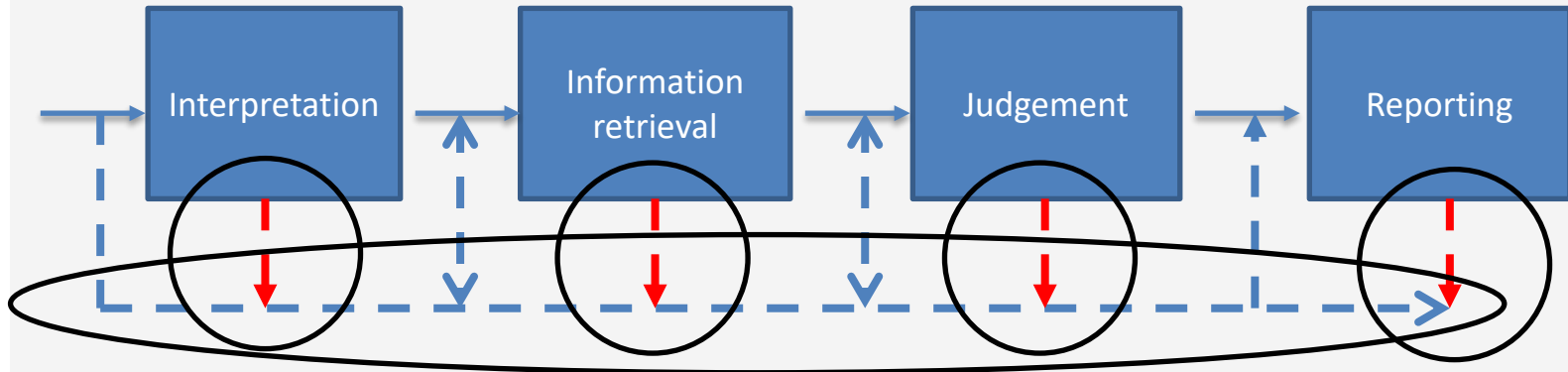


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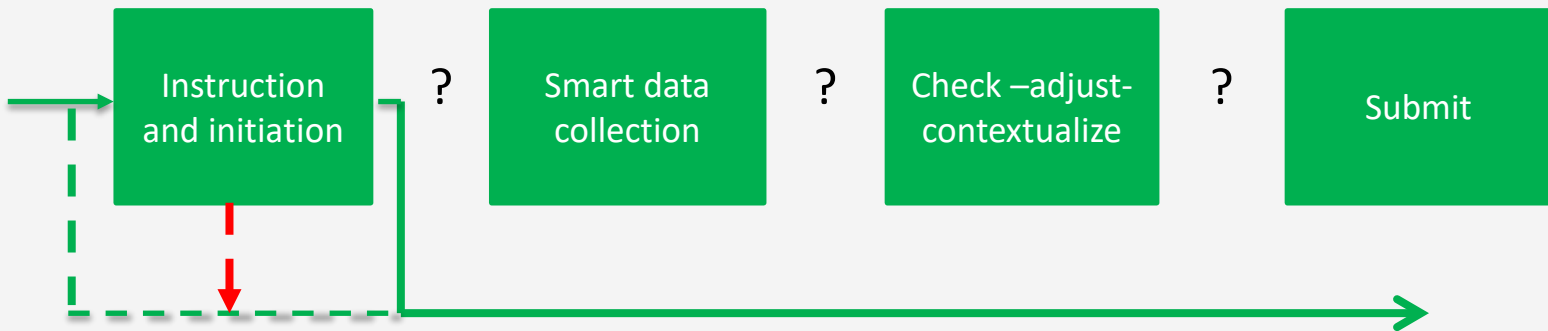


Smart tasks

Q & A cognitive process

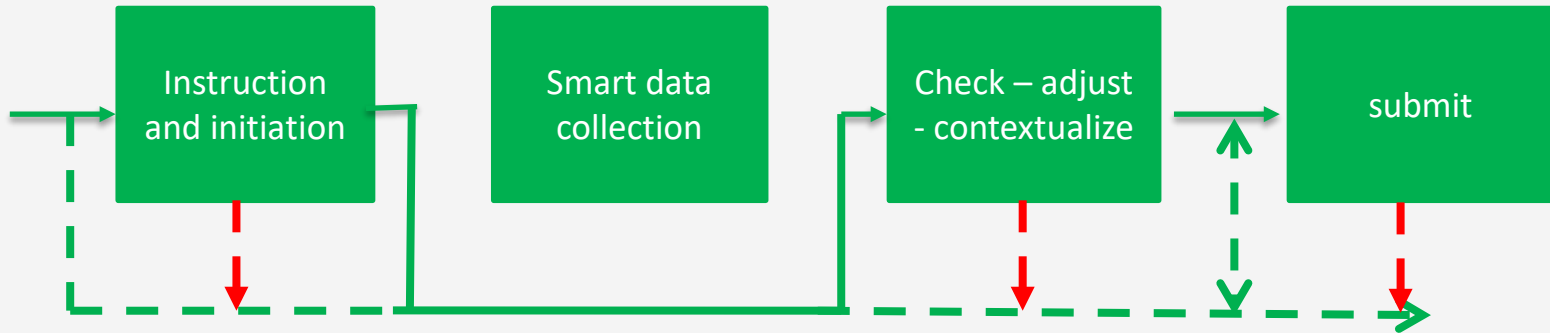


Smart task cognitive process – active-passive trade-off

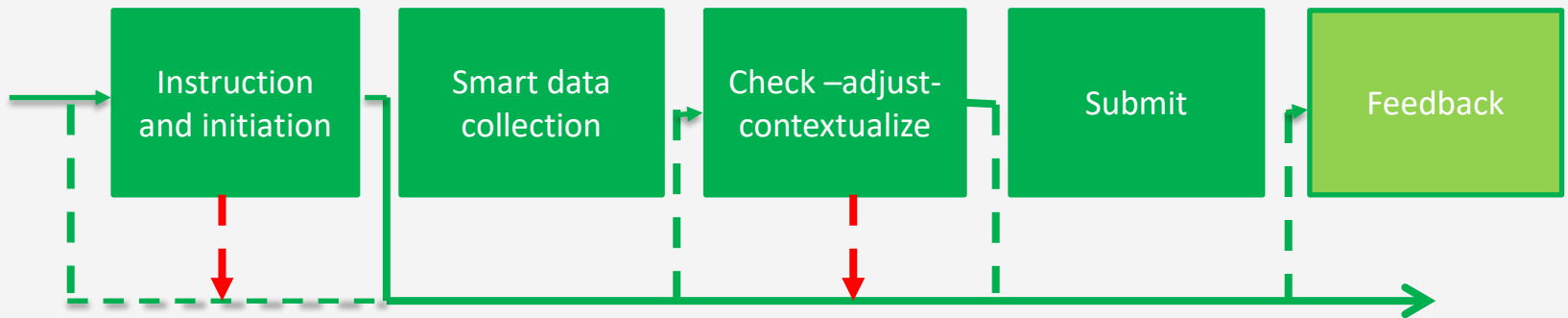


Smart tasks

Legal (- ethical) requirements



Respondent perspective



Smart tasks at risk

Two settings stand out:

1. Smart data are subject to influential representation and/or measurement error(s)
2. Respondents cannot be assumed to be knowledgeable about smart data that are being collected

Under 1, respondents may be needed to supplement, edit and/or provide context

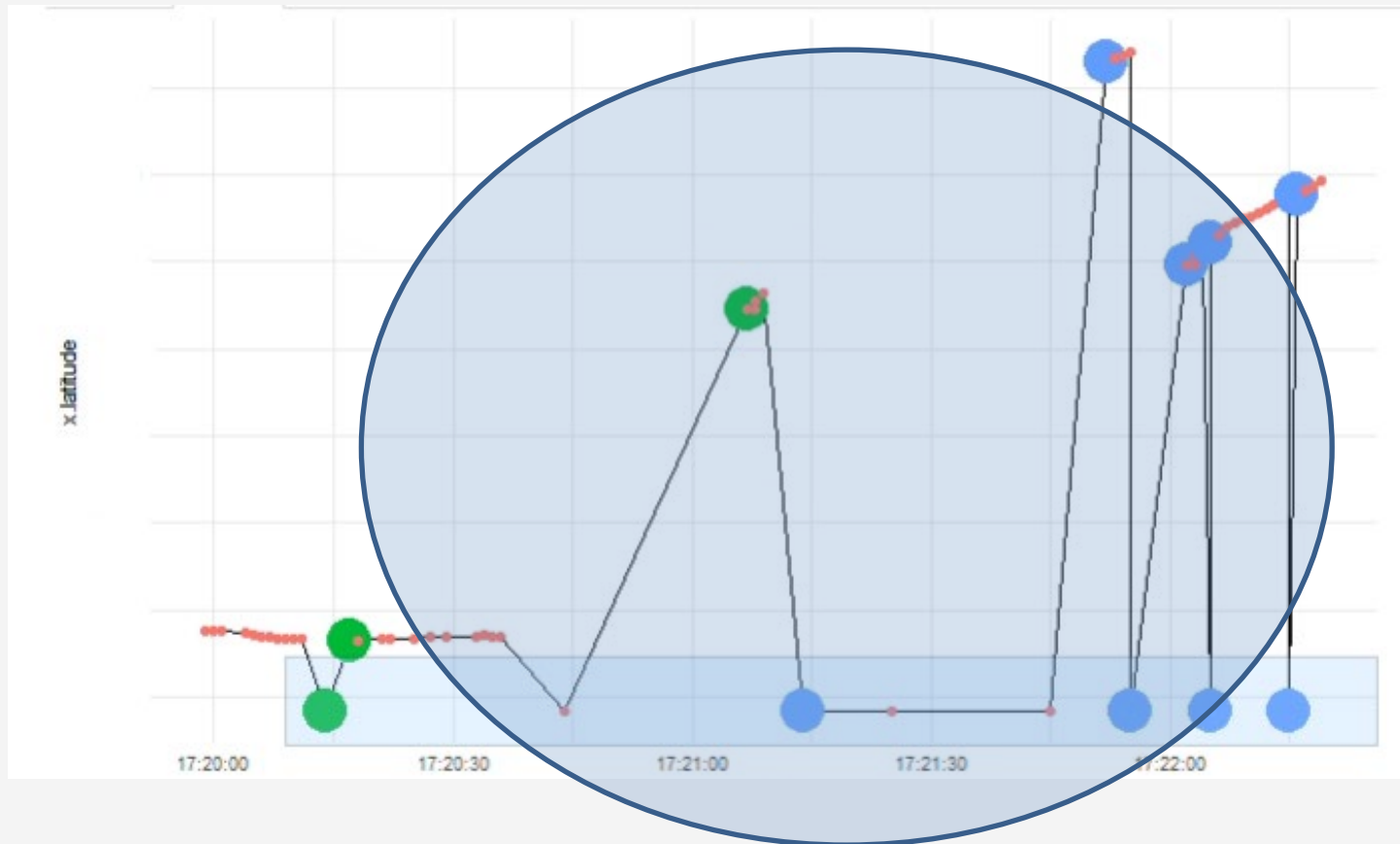
Under 2, respondents may not be competent (enough) to assist



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Smart tasks at risk – location tracking



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Smart tasks at risk – receipt processing



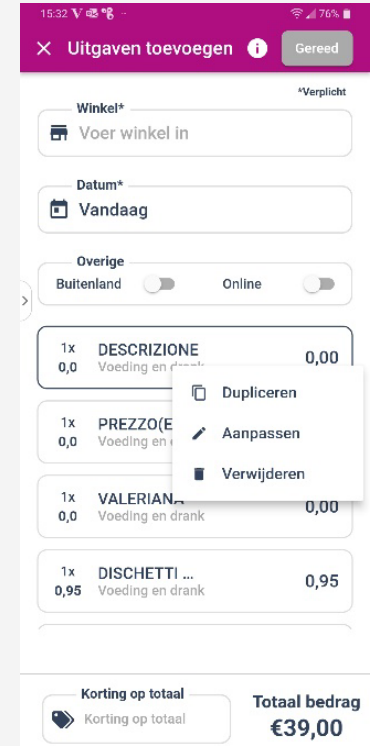
Respondent taking picture



Let respondent check contours



Respondent crops image



Respondent checks OCR-NLP-classify



Example analysis – Household Budget Survey

RQ: Does allowing to edit scanned (e-)tickets help?

NB: Zero amounts imply that OCR could not recognize the price

	With editing	Without editing
Correct amount	7.8%	2.7%
Difference amount ≤ 1 Euro	63.9%	11.1%
Correct number of products	27.6%	16.1%
Difference number of products ≤ 1	43.5%	45.5%
No zero amounts	38.0%	18.5%



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Conclusions and discussion

‘Voluntary’ active respondent editing seems:

- to lead to more in-app actions but to not affect drop-out
- to improve data quality but to not fully remove errors.
- to improve also other in-app behavior

Questions for workshop

- Are others looking into active-passive trade-offs in ‘smart’ surveys?
- If so, what experiences came out of studies?
- What navigation and clicking paradigms are especially useful?
- How to distinguish lack of competence from lack of motivation?
- In Summer 2024, we will do another field test that allows for randomizations across active editing options. Suggestions?

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