# Web Diary Feasibility Test: Preliminary Findings and Issues

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# Web Diary Team Overview

## Mission

▶ Testing the feasibility and impact of using a web diary to collect Consumer Expenditure Diary expenditures.

## Objective

▶ To understand the operational issues regarding implementing a web mode for CE and to understand the data quality and response rates associated with web collection for CE.

# Presentation Outline

I.   Web Diary Logistics
II.  Web Diary Instrument
III. Web Diary Materials and Training
IV.  Early Results

# I. WEB DIARY LOGISTICS

# Web Diary Logistics

- Data Collection Period – Jan, Feb, Mar 2013
- Test Closeout – Apr 30, 2013
- Starting Sample Size – 1,300 (Nationwide, less HI/AK)
- FR Workload – Approximately 2-3 extra cases/mo. per FR

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# Web Diary Logistics

- Separate online WD application (ASD)
- Separate CAPI instruments (test input files utilize research flag, interview period)
- Debriefing Qs (for both R and FR)
- Naming conventions developed for:
  - ▶ ASD production input files
  - ▶ ASD Web Data output / MCS CAPI Data output
  - ▶ NPC Web/CAPI data for Visual Basic keying

# Web Diary Logistics

- All research cases are "double placed"
- FRs provide username and password to Respondent via CAPI instrument
- New outcome codes for Web Diary
- New materials
  - ▶ FR Talking Points (FR)
  - ▶ User Guide (FR)
- Test Limitations
  - ▶ English only
  - ▶ No Multi-CU HHs or Replacement HHs
  - ▶ No Reinterview

# Web Diary Flow of Data

- **Web Data delivered to DSD from ASD**
  - ▶ Weekly (every Monday, 12:00am)
  - ▶ Cumulative, flat ASCII file
- **Web Data delivered from DSD to NPC for keying**
  - ▶ Weekly, Tuesday afternoon
  - ▶ CEPB unduplicates for Case IDs already sent to NPC in prior weeks
- **CAPI Recall Data delivered from DSD to NPC**
  - ▶ Monthly, five working days after closeout
  - ▶ Converted to same file structure as Web Data for NPC read-in
- **NPC delivers keyed Web and CAPI data to DSD**
  - ▶ DSD merges files and converts to SAS datasets per BLS specification
  - ▶ DSD conducts parallel data review and releases data to BLS

# II. WEB DIARY INSTRUMENT

# Web Diary CAPI Instrument

- Screener Qs for both research and production
  - HM_NET – "Does this household have internet access at home?"
  - EM_ACCS – "Is this through… (PC, tablet, mobile phone)?"
- Username and Password populated on "placement" screen
- "Web" placed as a fill before "Diary" on respective CAPI screens.
- Identical CAPI instrument used for both research and production cases

# Web Diary CAPI Instrument

- Additional interviewer instructions serve as cues for FRs

- In order to facilitate the collection of receipts as well as recalled data, a recall/receipts tab added for final pickup to allow for FR data entry

- Additional outcome codes created to:
  - Separately identify research vs. production cases
  - Prevent additional programming for ROSCO

# III. WEB DIARY MATERIALS AND TRAINING

# Training Materials

- Training materials (both R and FR)
- Two Training documents:
  - "Consumer Expenditure Diary Survey User Guide"
  - "FR Talking Points"

# Consumer Expenditure Diary Survey User Guide

- The Survey User Guide was designed as a reference guide for respondents.
- The User Guide provided instructions on
  - ▶ URL for the Web Diary
  - ▶ Username and Password
  - ▶ Start date for entering expenses
  - ▶ Creating a household roster
  - ▶ Contacting the FR and Regional office with questions and other concerns

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# Consumer Expenditure Diary Survey User Guide

# Consumer Expenditure Diary Survey User Guide

▶ **How and where to enter expenses**

- – **Food and Drink Away From Home**
- – **Food and Drink for Home Consumption**
- – **Clothing, Shoes, Jewelry and Accessories**
- – **All Other Products and Services**

▶ How to save work and add rows

▶ How to submit completed Web Diary expenses

# Consumer Expenditure Diary Survey User Guide

# Consumer Expenditure Diary Survey User Guide

▶ How and where to enter expenses

  – Food and Drink Away From Home

  – Food and Drink for Home Consumption

  – Clothing, Shoes, Jewelry and Accessories

  – All Other Products and Services

▶ **How to save work and add rows**

▶ How to submit completed Web Diary expenses

# Consumer Expenditure Diary Survey User Guide

When you navigate from one section of the diary to the next, your purchases will automatically be saved. You may also click **Save** at the bottom of the page at any time.



At the end of your 2-week record keeping period, you will submit your expenditures using the **Submit** button at the top of the page. You may still access your web diary after you hit **Submit**.

I will return on _____ to complete the interview.

**If you have any questions, please call:**

Regional Office:_____     Telephone:_____

# Consumer Expenditure Diary Survey User Guide

# Consumer Expenditure Diary Survey User Guide

▶ How and where to enter expenses
  – Food and Drink Away From Home
  – Food and Drink for Home Consumption
  – Clothing, Shoes, Jewelry and Accessories
  – All Other Products and Services

▶ How to save work and add rows

▶ **How to submit completed Web Diary expenses**

# Consumer Expenditure Diary Survey User Guide

# FR Talking Points

- For the Census FRs, the Web Diary Team created
  – FR Talking Points
- Similar in nature to the User Guide created for respondents
- The FR Talking Points also reminded FRs to emphasize to respondents which expenses not to record in the Web Diary
- The primary goal of the FR Talking Points was to provide a resource to FRs to thoroughly explain the Web Diary instructions to the respondent

# FR Talking Points

# Training -Web Diary VTC

- Video teleconference (VTC) was held at the end of November 2012

- HQ virtual presentation to all Regional Offices
  - ▶ Background and Overview of WD Feasibility Test
  - ▶ Logistics and CAPI Instrument Changes
  - ▶ Walk-through of the Web Instrument
  - ▶ Question and Answer session

# Training- Web Diary Self-Study

- FR training incorporated into November 2013 Refresher Training
- FRs had 4 hours to review materials (Self-study)
  - ▶ Introduction and Summary
  - ▶ Web instrument data entry
  - ▶ Practice interviews
- Each FR given
  - ▶ Unique username and password to log-into diary for independent walk-through
  - ▶ Respondent User Guide
  - ▶ FR Talking Points

# IV. EARLY RESULTS

# Web Diary Operational Issues

- No centralized "help desk" for respondents
  - ▶ Respondents were instructed to call (800) # as a direct line to DSD staff
    - General inquiries or surveys questions handled by Regional Office CE staff (or FRs)
    - Other technical issues, comments, or complaints forwarded to FSB via phone or email
    - 53 calls related to username/password issues, log-in after closeout, etc.
- DSD routed all non-password-related technical issues to ASD
  - ▶ Both FSB and DSD maintain Web Diary Issues Database for tracking and documentation

# January Web Diary Sample Performance

- Response Rate – 50.91%
- 3-Month Projection – 706 Completed Diaries
- Screened Out Cases (no internet access/language barriers) – 98 Cases

| | | |
|---|---|---|
| Sample Size (diaries) | 440 | 100.00% |
| Completes (diaries) | 224 | 50.91% |
| Refusals (diaries) | 216 | 49.09% |
| Target Completes (diaries) | 333 | --- |

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# Web Diary Respondent Compliance

- **Web Diary Failed Log-ins**
  - Defined as a placed diary where respondent failed to log into the instrument
  - 38 out of 113 cases – 33.63%
  - Receipt and recall data

- **Average Number of Diary Entries per Week**
  - Web Diary (not including recall data) – 23.39 mean diary entries per week
  - Production Diary (not including recall data) – 31.60 mean diary entries per week

# Web Diary FR Focus Group

- Three focus group sessions consisting of a sample of FRs
  - Self-study training
  - Respondent materials
  - Help desk hotline
  - FR monitoring procedures
  - Save/submit procedures
  - Receipt and recall collection procedures
  - Favors younger and more tech-savvy respondents

# Overall Results

- **Encouraging results**
- **Concerns**
- **Next steps**

# Acronym Definitions

- WD – Web Diary
- FR – Field Representative
- R – Respondent
- CU – Consumer Unit
- HH - Household
- CAPI – Computer-assisted Personal Interviewing
- MCS – Master Control System
- FSB – Financial Surveys Branch
- CEPB – Consumer Expenditure Programming Branch
- DSD – Demographic Surveys Division
- ASD – Application Support Division
- NPC National Processing Center
- ROSCO – Regional Office Survey Control

# Contact Information

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