# 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**

- 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



## 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**

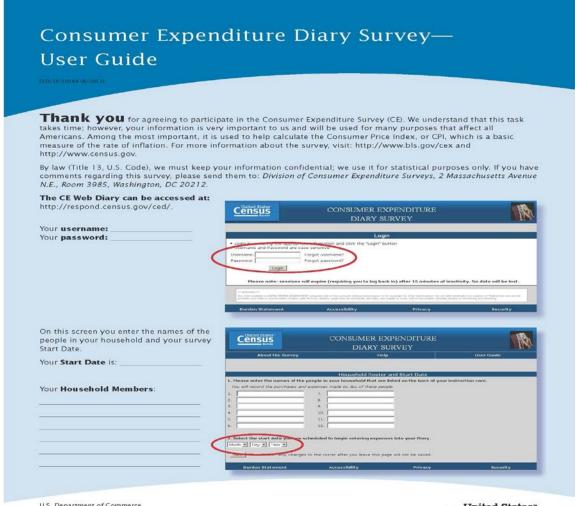
- Training materials (both R and FR)
- Two Training documents:
  - "Consumer Expenditure Diary Survey User Guide"
  - "FR Talking Points"



- 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











- ► 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





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Lunch	-	sandwich, soda	Employer or School Ce▼	\$5.15					03-14-2011	0
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Lunch	•	elem. school lunch - moi	Employer or School Ce_▼	\$45.00	Г				03-15-2011	
Snack/Othe	r 🔻	soda	Vending Machines or №	\$.65					03-21-2011	
Dinner	•	buffet	Full Service Places 💌	\$62.23	V	Г		\$12.00	03-23-2011	0
Snack/Othe	r 🔻	drinks from cash bar	Full Service Places 🔻	\$15.00	Г	V	₽	\$15.00	03-23-2011	0
Dinner	•	caterer-Family Reunion	Fast Food, Take-out, C	\$350.00		Г	Г	\$95.00	03-24-2011	0



- ► 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
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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.

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At the end of your 2-week record keeping period, you will submit your expenditures using the Submit button at the to	p
of the page. You may still access your web diary after you hit <b>Submit</b> .	

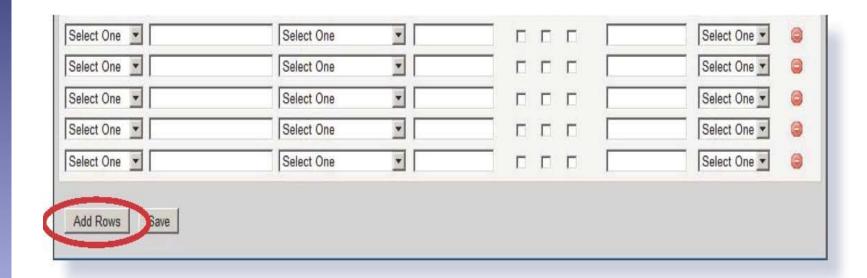
I will return on	to complete the interview

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

Regional Office:	Telephone:
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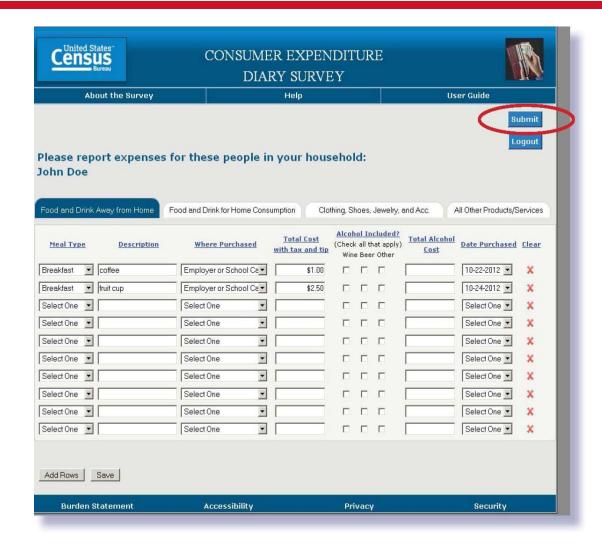




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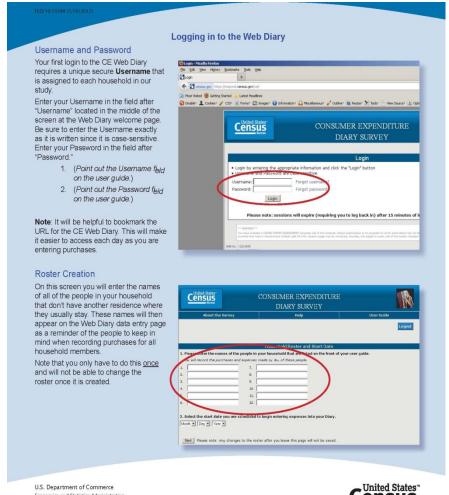
## **FR Talking Points**

- For the Census FRs, the Web Diary Team createdFR 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, login 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	



## 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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