

# Panel Survey Dilemma: How to Implement the Results of Pre-Testing in Consecutive Waves?<sup>1</sup>

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## Abstract

The paper discusses the role of pre-testing in consecutive waves of a panel survey, investigating how attitudes and opinions change over long periods of time. On one hand, accounting for this change requires that the phrasing of questions should remain unaltered. On the other, pre-testing may reveal that respondents experience difficulty in understanding some items, for instance due to the possible shifts in meaning that occurred over time. The paper discusses the issue of implementing the results of a pretest, presenting experiences gained during pre-testing of the Polish Panel Survey POLPAN 1988–2018, conducted in March 2018. Questionnaire items selected for analysis deal with the determinants of life success, the intensity of social-group conflicts, and the self-evaluation of social position. The main conclusion is that the questionnaire items should undergo minor modifications, but only if necessary, while the feedback from pre-testing should be used in fieldwork instructions for interviewers and should also be taken into account in the interpretation of the results of the main survey.

**Key words:** pre-test, panel study, determinants of life success, social-group conflicts, self-assessment of social position

## INTRODUCTION

Testing a questionnaire involves, in broad terms, identifying content- and structure-related problems and fine-tuning the research instrument to ensure that it provides desired information and yields answers to the research questions. Pre-



testing is aimed at reducing measurement error by checking the intelligibility of survey items, determining whether (or not) respondents interpret them in a way intended by the researcher, evaluating the order of questions, and assessing overall adequacy of field procedures. It also helps to reduce the burden on respondents (Converse and Presser 1986).

Conventional pre-testing consists of interviews that follow the exact same pattern as in the main survey, executed on a small number of respondents selected non-systematically. However, this method has been criticized for relying on the feelings and judgments of interviewers, who might miss problems which were not clearly indicated by respondents. “As a result, undeclared conventional pretesting seems better designed to identify problems the questionnaire poses for interviewers, who know the purpose of the testing, than for respondents, who do not,” concludes Stanley Presser (Presser et al. 2004a: 3). Another disadvantage of a conventional pre-test is that, as it is based on a low number of interviews and non-systematic observations, it is difficult to draw methodological conclusions from it (Grzeszkiewicz-Radulska 2012; Presser et al. 2004a).

Researchers have sought new methods in survey pre-testing, such as cognitive interviews, behavior coding, vignette analysis, experiments and statistical modeling (cf. e.g. Oksenberg 1991; Foddy 1996; Presser et al. 2004a), with the cognitive approach and cognitive interviews being developed during the 1980’s and gaining particular popularity in the following years (Tourangeau 1984; Campanelli 1997; Willis and Schechter 1997; Tourangeau, Rips, and Rasinski 2000; Beatty and Willis 2007; Collins 2003, 2015). Over the years, new literature on the subject has been published, with accounts of comparative studies on the effectiveness of different methods (e.g. Rothgeb, Willis, and Forsyth 2007).

In 2004 Presser et al. (2004b) wrote that pre-testing – generally viewed as an indispensable step in a survey project – was rarely given due prominence in textbooks or survey reports, and sometimes was entirely disregarded. However, the most recently published textbooks and training materials have increasingly often covered the subject quite thoroughly (e.g. Ornstein 2013; Blair, Czaja, and Blair 2014; Gobo and Mauceri 2014; Caspar et al. 2016; Willis 2016).

In Poland, the key role in the discussion of pilot-testing surveys has been played by the Łódź School of Methodology (Lutyński 1990; Grzeszkiewicz-Radulska and Krzewińska 2015; Grzeszkiewicz-Radulska 2012) led by Jan Lutyński and Zygmunt Gostkowski. The concept of *in-depth pre-testing*, developed in the 1970s and 1980s by Krystyna Lutyńska (1976, 1978, 1984), has emerged as particularly important and frequently employed. In-depth pre-testing, as described by Lutyńska, is aimed at evaluation of the questionnaire as a tool for obtaining needed information – information that is not only relevant, but also accurate (Lutyńska 1984: 59). It differs from conventional pre-testing already in the sample selection: respondents are not

chosen randomly, but according to the representativeness of different categories or types of respondents. Those respondents are asked not only the questionnaire questions, but also questions from the interviewer (“pilot questions”) whenever he or she judges it is necessary to check the accuracy of the respondent’s answer. Interviewers’ observations are then analyzed in a systematic (often quantitative) way.

In the contemporary Polish literature, the subject of pilot studies and pre-testing is less popular than in the past. More recently, Paweł and Franciszek Sztabiński (2005) have emphasized the importance of pre-testing and trial studies which allow researchers to verify their ideas against the fieldwork reality, focusing on detection and correction of question phrasing errors. The authors present a strategy of pre-testing combined with a trial study (applied in the second wave of the *European Social Survey*) that includes questionnaires designed in a special way (allowing interviewers to make instant notes on respondents’ reactions), fieldwork instructions, report forms filled by interviewers after each interview, a debriefing discussion, and analysis of collected material for the final report.

Literature on pre-testing focuses mostly on new or repeated cross-sectional surveys. Long-term panel surveys present particular pre-testing challenges, especially for consecutive waves. On one hand, the changes that come with time bring considerable shifts in how some questions could be interpreted (e.g. as a result of alteration over time of the meaning of certain phrases, especially those with political connotations). On the other hand, though, it is crucial that information collected from respondents in consecutive waves of the survey is standardized, which entails the necessity to avoid changes in how the questions are phrased. Thus, the dilemma of researchers involved in long-term panel surveys: Should questionnaire items be modified as a consequence of pre-testing of a current wave? Are there other ways of implementing pre-test findings without diminishing inter-wave comparability?

This paper presents selected results of a pre-test of the most recent wave of the Polish Panel Survey POLPAN 1988–2018. Detailed information concerning the POLPAN study can be found at [www.polpan.org](http://www.polpan.org); see also Słomczyński, Tomescu-Dubrow, and Dubrow (2015). Initially, POLPAN was launched at the turn of 1987 and 1988. It was conducted on a representative sample of individuals aged 21–65. It has been repeated at five-year intervals (*i.e.* in 1993, 1998, 2003, 2008, 2013, and 2018), with renewal sub-samples of the cohort aged 21–25. POLPAN respondents were asked questions concerning a large variety of issues, such as professional occupation, educational achievements, family background, social networks, and financial situation. For all waves, the interviews have been conducted face to face by qualified interviewers using paper questionnaires (PAPI).

In this paper we first briefly describe the history of pre-testing in the POLPAN project. Then we move to the pre-test of the most recent wave, conducted in 2018.

Focusing on three selected questionnaire items, we describe problems encountered during pre-testing, and present solutions that have been adopted. We conclude by stating that in the case of panel studies, questionnaire items should undergo minor modifications only if necessary, but the feedback from pre-testing should be used in fieldwork instructions for interviewers, and, importantly, it should be taken into account in the interpretation of the main-survey results.

### PRE-TESTING IN THE POLISH PANEL SURVEY POLPAN 1988–2018

From its very beginning POLPAN has had extensive substantive goals, aiming at capturing different dimensions of social structure: the objective and material ones, as well as those pertaining to opinions and attitudes. In the first wave, conducted in 1987–1988 (and at that time not planned as a panel study), researchers intended to deliver a comprehensive description of the Polish social structure in the late 1980s. The survey involved a large sample ( $N = 5,817$ ), and was preceded by a trial study ( $N = 1,894$ ). The trial study mainly served as an extended *reconnaissance* in order to develop research instruments suitable for the main study. The relationship between the trial and main studies is discussed in detail by Słomczyński et al. (1989).

For the record, we should emphasize that the pre-testing of both the trial and main study is an exemplary work performed in Łódź by the Section of Pilot Studies, Department of Methodology of Social Research of the Institute of Philosophy and Sociology, Polish Academy of Sciences. It followed the methodology of the *in-depth pre-testing* developed by Lutyńska (1976, 1978). For example, the pre-testing of the trial study involved not only preliminary interviews on a testing sample of respondents, but also re-interviewing them on the modified questionnaire, based on the results stemming from testing its initial version.

The political situation can have a significant impact on the shape and the focus of pre-tests. For example, the pre-testing of the main survey in the late 1980s required special caution due to the politically sensitive questions at the time of the “real socialism” in Poland, e.g.:

*Without the strong government led by the Polish United Workers' Party Poles will always cause problems to themselves and others.* Answers: (1) *I agree completely*, (2) *I somewhat agree*, (3) *I somewhat disagree*, (4) *I do not agree at all*.

*The right to strike is an important right of any worker.* Answers: (1) *I agree completely*, (2) *I somewhat agree*, (3) *I somewhat disagree*, (4) *I do not agree at all*.

*Have you been or are you a member of a trade union?* An affirmative answer was followed by a question *Which and when?*, effectively determining whether the respondent was a member of the Solidarity movement, which at that time was considered to be political opposition.

There were also questions concerning respondents' and their fathers' membership in the Polish United Workers' Party (PZPR), the United Peasantry Party (ZSL), and the Democratic Party (SD):

*Have you been or are you a member of the PZPR, ZSL or SD?*

*Was your father [when you were 14 years old] a member of PZPR, ZSL, SD or any other political organization?*

Pre-tests revealed that respondents viewed the politically-loaded questions as justifiable by the scientific purpose of the survey. One of the reasons that respondents felt comfortable in answering such questions involved the sponsor of the study. The study was conducted under the auspices of the Polish Academy of Sciences, at that time perceived by the public as prestigious and trustworthy.

After 1989, with the onset of democratic change in Poland, the POLPAN study acquired a new dimension. The questionnaire in the actual first panel wave, conducted in 1993, focused on the radical transformations taking place in Poland: the fall of communism, introduction of the democratic regime, and transition from a centrally planned economy to the capitalist market system. These changes had monumental impact on multiple spheres of Poles' lives, hence the research instrument needed to be adapted to the new reality. New questionnaire items were considered in order to collect data about the respondents' placement on the job market or their objectively assessed material status, but also about their opinions on various aspects of then current social change.

Further economic and political reforms, as well as job market dynamics also significantly influenced the shape of POLPAN questionnaires in consecutive waves of the study. In 1998 and 2003 the perspective of Poland's accession to the European Union inspired the POLPAN team to ask respondents about their opinions on the prospect and their potential vote in the upcoming accession referendum. In the following years: 2008, 2013, 2018, these questions transformed into an inquiry into opinion on the results of Poland's accession to the EU.

Developing the questionnaire has always been a complex process. Prior to each wave, POLPAN questionnaires have been pre-tested for question understanding and clarity of fieldwork instructions.

The 1993–2003 waves of POLPAN were preceded by intensive interviews that yielded information on how respondents interpret specific items of the questionnaire. These interviews followed the strategy developed by Lutyńska (1976, 1978, 1984) that involves elements of cognitive interviewing. Having thoroughly tested the effectiveness of the research instrument (which by the nature of a panel survey is required to remain in a relatively unchanged form), it was decided that the pre-testing in 2008 and 2013 would be limited to interviews conducted by members of the POLPAN research team. Modifications to the questionnaire made on the basis of these interviews were minor. No changes were observed in the interpretation of the questions across the period since the decade 2003–2013 was a time of relative political stability. When discussing the pre-test study for POLPAN 2018, researchers took into account political and social changes that had occurred since the latest parliamentary election (2015), changes that could significantly affect the interpretation of issues in the areas of perceived determinants of life success or social-group conflicts.

## OVERVIEW OF THE 2018 PRE-TEST

In 2018, pre-testing was carried out on a modified version of the 2013 questionnaire, although the content of the questions selected for this analysis has not changed. The only modifications concerned reordering of question blocks. In the version tested, the questionnaire opens with a section dedicated to the importance of various sources of success, followed by questions about the intensity of social-group conflicts. In the first five waves of POLPAN (1988–2008) the questionnaire opened with a section of questions referring to the respondent's general life and occupational status. However, in 2008 interviewers suggested that questions about the respondent's occupational status should be moved further into the questionnaire since these questions were detailed and complicated, discouraging respondents from participating in the study. Following these comments, in 2013 the questionnaire started with a set of questions evaluating conflicts between different pairs of social groups. However, in 2018 growing social tensions rendered the questions about conflicts more sensitive than in the past. Thus, it was decided that respondents should be eased into the interview with more neutral and somewhat easier questions about the determinants of success (previously this section had been situated roughly half way through the questionnaire).

Interviewers for the 2018 pre-test were recruited from among the members and collaborators of the Research Team for Comparative Analyses of Social Inequality (CASIN). Following the suggestion of Paweł and Franciszek Sztabiński (2005) the team included interviewers with years of experience in the field, as well as persons with thorough knowledge of POLPAN but with less experience in conducting

questionnaire interviews. Instructions for interviewers included (a) respondent recruitment criteria (according to age<sup>2</sup>, occupational and educational status; no familiarity with POLPAN), (b) interview recording rules, (c) rules regarding offering rewards for respondents<sup>3</sup>, and (d) use of field reports for comments on the questionnaire. Moreover, the interviewers were provided with detailed definitions of key terms dealing with occupational careers, and were sensitized to the changes introduced into the questionnaire in comparison to the 2013 version.

Pre-testing interviewers were obliged to fill out, after each interview, a field report, in which they specified the difficulties that had occurred during the interview, and other comments concerning the interview. The report form includes open-ended questions about impressions from the interview as well as detailed questions referring to specific items. Since the pre-test interviewers had been familiarized with the content of the questionnaire beforehand, they were fully aware of the sensitive areas that required particular focus.

After completion of the fieldwork a debriefing was held in the form of a focus group. The purpose was to share experience from the pre-test and develop final suggestions for necessary amendments to the questionnaire. The discussion was structured according to the guidelines about which the pre-testers had been informed beforehand, which allowed reduction of the quantity of random and incomparable reports from the fieldwork.<sup>3</sup>

Twenty-two interviews were conducted in the pre-test study involving inhabitants of Warsaw and the Warsaw region, of Łódź, and of Zielona Góra and its vicinity. Researchers aimed to achieve the widest diversity in terms of occupational and educational status. The sample consisted of 9 women and 13 men aged 26 to 62 (39 on average). Four respondents had elementary education, four – basic vocational, six – secondary, and eight – higher education. For details regarding occupation, see Annex 1.

The outputs of the pre-test were the following:

- questionnaires of the interviews conducted in the field,
- recordings of most of the interviews,
- field reports completed by interviewers,
- a recording and transcript of the debriefing.

Interview questionnaires contained comments made spontaneously by the interviewer while conducting the interview. As mentioned above, the interviewers also completed a report form with questions about the questionnaire's structure and about the understanding and sensitivity of the questions. There were also questions about specific elements of the pre-test questionnaire – mainly focusing on occupational career and education. Interviewers' answers to the following two questions from the pre-test report sheet were the most abundant in interesting information concerning different questionnaire items:

*Which of the questions did the respondent find difficult? (referring to topics the respondent did not know much about, respondent was not clear on what the question was actually about, terms or phrases were not understandable, the syntax was too complex, etc.). Please, indicate question numbers or sections and specify what caused problems.*

*Which of the questions were sensitive to the respondent? (caused embarrassment, discomfort, felt as an intrusion on their privacy, etc.). Please, indicate question numbers or sections and specify what caused the problems.*

A report was developed on the basis of the above sources, with general comments provided by the interviewers after the pre-test, and with detailed comments relevant to specific questions, as well as suggestions for potential changes in the questionnaire and further analyses based on POLPAN data.

For the analysis presented in this paper we have chosen three questionnaire items. The first reason for selecting them is the fact that all of them were included in the POLPAN study from its very beginning, so after pre-testing there was considerable tension between the desire to improve their wording and the need to maintain the inter-wave comparability of the survey. All those items have also been asked in the same or similar form in major international surveys, such as the *International Social Survey Programme*. The answers to these three items, obtained within the POLPAN study, have been analyzed in many publications, including: Janicka and Słomczyński 2007; Baczek-Dombi and Wysmułek 2014, 2015, 2016; Słomczyński and Janicka 2016; Baczek-Dombi and Wysmułek 2017; Janicka and Słomczyński 2017 (determinants of life success); Janicka 2000, 2002, 2003a, 2003b, 2007, 2014; Andrejuk 2014 (social conflicts); Słomczyński and Kacprowicz 2017 (self-assessment of social position). Moreover, we want to discuss questions that during the pre-test caused not only minor ‘technical’ difficulties, but also confused some respondents due to interpretation problems.

## **DETERMINANTS OF LIFE SUCCESS**

The question about the determinants of life success was asked at the beginning of the questionnaire. It was asked in all waves of the POLPAN study, with some modifications introduced in 2003 and 2008<sup>4</sup>, and is a modified (mostly reduced) version of a corresponding question asked in the 1987 *International Social Survey Programme* (ISSP Research Group 1989). Analyses of the responses to the life success determinants question, developed by the members of the POLPAN team, revealed trends such as the growing importance of meritocracy (Słomczyński and Janicka 2016; Baczek-Dombi and Wysmułek 2015).

In the pre-test the relevant question was phrased as presented in Table 1.



**Table 1.** Life success determinants question

*First, I would like to talk about factors that, according to you, contribute to success in life. To what extent, in your opinion, are certain things important for achieving success in life? Let us start with ambition. For achieving success in life, is ambition absolutely necessary, very important, somewhat important, somewhat unimportant, or not at all important?*

After noting in row (a), read the question for (b) to (h).

For achieving success in life, is ...	absolutely necessary	very important	somewhat important	not very important	not important at all	don't know, difficult to say
<b>(a)</b> ambition	1	2	3	4	5	8
<b>(b)</b> knowing the right people	1	2	3	4	5	8
<b>(c)</b> hard work	1	2	3	4	5	8
<b>(d)</b> political influence	1	2	3	4	5	8
<b>(e)</b> coming from a rich family	1	2	3	4	5	8
<b>(f)</b> good education	1	2	3	4	5	8
<b>(g)</b> luck	1	2	3	4	5	8
<b>(h)</b> innate abilities	1	2	3	4	5	8

The main difficulty was that some respondents were unclear about which area of life the success referred to. Quite possibly, panel respondents who were used to POLPAN questionnaires were more likely to focus more on occupational life, as the study places considerable emphasis on this area.

The highest number of comments was recorded for item (d) – importance of political influence to achieve success. The respondents asked to what influence the questionnaire was referring, and by whom. One male respondent, thinking out loud while answering the question, said, “In private life? Not very important then”, which suggests that he interpreted “success in life” as pertaining to the private sphere only. Another respondent claimed that the importance of political influence for success in life depends on one’s type of career. Yet another manifested a very negative response to the term “political” itself, saying: “Not important, I don’t like politics”.

During training before the main 2018 study, the interviewers were made aware that some expressions from the question on success determinants may be understood in many different ways. A special recommendation was made in the fieldwork instructions stating that in the case when a respondent finds the question unclear, the interviewer is to offer the standard instruction: “Just as you understand it”. In order to maintain comparability with the previous POLPAN waves, in the final version of the 2018 questionnaire the formulation of the question was left unchanged, and no supplementary suggestions were added in the fieldwork

instruction for the interviewers to guide respondents in clarifying definitions of concepts related to the question.

## THE INTENSITY OF SOCIAL-GROUP CONFLICTS

In 1988–2008, POLPAN included questions about the intensity of social-group conflicts between: (a) rich and poor people, (b) manual and non-manual workers, (c) managers and their employees, (d) people who live in cities and people who live in rural areas, (e) religious and non-religious people, (f) the people in power and the rest of society, (g) business owners and employees, (h) more and less educated people (j) younger and older generations. In 2013, item (i) was added, asking about conflicts between the supporters of different political organizations (parties and fractions). This item differs from other items in that it does not juxtapose two groups. This is due to the fact that in Poland it would be difficult to identify two stable political groups that would be ideological opponents on multiple dimensions. In particular “the left” and “the right” do not seem to be stable concepts in Poles’ minds. Their fluidity and ambiguity in Poland has been confirmed by multiple analyses (e.g. Godlewski 2008, 2012; Sadowski and Łukowski 2013; Kwiatkowska et al. 2016).

**Table 2.** Intensity of social-group conflicts questions

*There are conflicts between different social groups in every country. I am going to name some groups and would like you to tell me how much conflict there is, in your opinion, between these groups in Poland. Is conflict between the rich and the poor very strong, rather strong, rather weak, or is there no conflict?*

After recording the answer (a) read out the question for each category (b) to (j).

Would you say that conflicts between ..... are:	very strong	rather strong	rather weak	very weak / no conflict at all	don't know, difficult to say
(a) rich people and poor people	1	2	3	4	8
(b) manual and non-manual workers	1	2	3	4	8
(c) managers and their employees	1	2	3	4	8
(d) people who live in cities and people who live in rural areas	1	2	3	4	8
(e) religious and non-religious people	1	2	3	4	8
(f) those in power and the rest of society	1	2	3	4	8
(g) business owners and employees	1	2	3	4	8
(h) more and less educated people	1	2	3	4	8
(i) supporters of different political organizations (parties and groups)	1	2	3	4	8
(j) younger and older generations	1	2	3	4	8

The social-group conflict section from the 2018 questionnaire is presented in Table 2. Respondents were presented with a card listing all possible answers for evaluating conflict intensity, from very strong to not strong at all, or no such conflicts at all. The idea behind the pre-test was to explore respondents' understanding of possible sources of conflicts as well as to test the answer scale.

The key issue emerging in relation to this question in the 2018 pre-test were the diverse interpretations of the term "conflict", or demands from respondents that the interviewer clarify what he or she is asking about. Audio recordings of some respondents' thinking out loud lead to the conclusion that they "tried on" different definitions of conflicts (and rejected some), for example: strong, but not externalized tensions, conflicts of interest, class struggle, various inequalities, open conflict involving violence, or simply meaningful differences between people. Several respondents openly verbalized the ambiguity of the key term used in the question, e.g.: "The term 'conflict' is just too wide, right? Perhaps there are conflicts between the rich and the poor, but it's not like a... I don't know... a war between one group and the other, but conflicts of interests, right? And here you ask about a conflict between two persons, two entities, right? Is conflict understood in this way here?". One female respondent after answering the question provided an explanation on what kind of conflicts she had in mind: "I have a comment: these tensions and conflicts are strong, but not externalized. It's not like people are going out on the streets and fighting, or [...] arguing with each other in the shop, but I think there's some kind of strong tension." Some respondents declared themselves uninterested in politics or social issues, which rendered the question particularly difficult in their case. This difficulty was sometimes verbalized and at times, it can be suspected, caused them to take longer to consider their answer, or led to a specific answering pattern (one of the respondents spread her answers across the scale for the first four items and then proceeded to answer "very strong" to all the remaining ones).

In the pre-test version of the questionnaire, the questions presented in Table 2 were followed by the ranking of conflict pairs. Asked in the 2013 wave, the conflict ranking questions were phrased as follows:

(1) *Conflicts between which groups listed on this card, would you say, are the strongest? There are ten pairs of groups on the card. Please, indicate no more than three pairs, starting from the one with definitely the strongest conflict.*

(2) *And between which groups, would you say, conflicts are the weakest. Again, please, indicate three pairs of groups with less conflict, starting from the pair with very little conflict or no conflict at all.*

The researchers intended to include the ranking questions in the 2018 survey, aiming to collect rich material for the widely discussed methodological topic of rating and ranking (Ng 1982; Alwin and Krosnik 1985; Krosnick and Alwin 1988; Sprumont 2018). However, the 2018 pre-test revealed that numerous respondents found them difficult and failed to provide the answer, or their responses were inconsistent. For instance, some respondents ranked the conflicts between religious and non-religious people the strongest while in the preceding question they had rated the conflict in this pair as “not very strong” or “no conflict at all”. Such inconsistencies are also visible in the analysis of the 2013 data. Additionally, respondents commented on the redundancy of the request to rank conflict pairs after having answered the rating questions, which was yet another argument for dropping the ranking question from the 2018 questionnaire.

### **SUBJECTIVE SOCIAL POSITION**

The question about the respondent’s place on the social scale was asked already in the first POLPAN wave conducted in 1988. Any changes to the question over time were limited to the scale only.<sup>5</sup> In 1988, 1 was the lowest degree and 10 was the highest extreme. In 1993, as a result of pre-testing intensive interviews, it was decided that the reverse (1 = top of the scale, 10 = bottom) would be easier for the respondents. This scale was used in four consecutive waves of the study. In 2013 an eleven-degree scale was introduced, with 0 as the bottom of the scale and 10 – as the top. This solution was kept in the pre-test of the 2018 questionnaire.

Below is the question verbatim:

*Comparing different social groups in our country, people think that some are lower and some higher. Here is a scale, where the lowest point (0), means groups situated the lowest and, ten (10) stands for the groups that stand the highest. Using this scale, please, tell me where you would place yourself. (88 – don’t know, difficult to say)*

With regards to the question about the self-assessed position on the social group scale, the 2018 pre-test revealed that some respondents struggle with the criteria they should take into account when comparing themselves against others, e.g.: “But I cannot determine it, because I would have to know what we are assessing here. Is it wealth, education, satisfaction with life, or, for example, place of residence, or how I find myself among people?”. Respondents adopted various interpretations of social hierarchy. Some, after a moment of consideration, resolved to look at income, wealth, education or broadly “social status.” One respondent refused to answer the question precisely due to the conceptual ambiguity, while one person,

who had been unemployed for a number of years, placed herself at the top of the scale, because of the “awareness” that helped her to “live a better, easier life, to live well, instead of, as they say, having a herd mentality”.

Difficulty in answering this question may be largely due to the fact that respondents are not used to thinking of their social position in the macro scale. Quite probably they would find it easier to compare themselves to a neighbor than to some abstract “social group”. It happens quite often that respondents answer an abstract question by calling on a concrete, specific case to provide an example on which they could base their response. For instance, one of the respondents justified her high evaluation of the European Union by saying: “I’ve finished a free computer course founded by the EU”. Another rated the overall impact of the EU on Poland as quite low because she had heard in the media that “they recently imposed restrictions regarding breeding animals for fur”. The 2012 NONWORK study<sup>6</sup>, an extension of POLPAN, revealed the same problem with abstract concepts, with respondents finding it difficult to determine their social class. Moreover, by its very nature, the question on social position that uses an ordinal scale entails a hierarchical view of society, which does not necessarily coincide with many respondents’ subjective view of it.

One of the interviewers pointed to a lack of coherence within the question. While it opens with a reference to social groups, the respondent is then asked to place themselves on the scale as an individual. According to the interviewer, the question should ask about the respondent’s group or the respondent individually, but in a group context (as a group member).

In the final version of the questionnaire, the question was left unchanged and a comment was included in fieldwork instructions: “How the respondent views their social position compared to those who are at the top and bottom of the scale.”

In the pre-test questionnaire, the respondent’s social scale self-placement was followed by a question about their position in five years time (*Thinking about the future, where would you place yourself in five years on the scale?*). Pre-test interviews revealed that at least some respondents used “wishful thinking” and chose the position they aspired to (rather than one they would probably achieve, taking into account their circumstances and life track record). For example, a single mother of three (two were probably taken from her care by the court), living in an assisted housing arrangement, with incomplete lower secondary education, placed herself at the top of the scale. The question was not included in the final version of the questionnaire.

During the 2018 pre-test we did not observe any major problems caused by the eleven-degree scale introduced in 2013. In particular, for all respondents it seemed natural that the mid-point of the scale was the number 5, with 0-4 on the one side and 6-10 on another.

## **DIFFERENCES IN EDUCATIONAL BACKGROUND AND INTEREST IN POLITICS**

One of the topics in the discussion of the pre-test interviews was the differences related to the respondent's characteristics such as education and interest in socio-political affairs. Practically all interviewers agreed that people with higher education tend to ask more questions and are more likely to signal difficulty in understanding a question. Here we quote a typical remark: "It was the educated respondents who were more likely to ask for clarification, said they were not sure if what they had in mind were the right kind of conflicts, life achievements or statuses. This was the group that indicated difficulty understanding the questions far more often than less educated people (...)". Meanwhile uneducated respondents, "Had no such problems, they simply answered the question: question, answer, question, answer, even if they don't know something, and such moments did occur and you could sense it, they went, 'I don't understand the question. Please repeat' and still did not understand, but they answered anyway because they would feel silly if they did not." Unfortunately, this sometimes leads to random and even conflicting answers.

The degree of interest in socio-political matters was a very important determinant of the quality of an interview, independently of the respondent's level of education. One of the interviewers described his experience thus: "It was quite clear, when a respondent declared at the start that they had no interest in politics and such matters, they had far more difficulty with a variety of questions throughout the interview. The thing is, if they had, say, primary education, even vocational, but very clear ideas, it was much easier to talk to such a person". No interest in politics or social issues is a major obstacle to obtaining a successful interview and instead often yields predominantly "don't knows" or simply contradictory answers to questions.

## **CONCLUSIONS**

The dilemma of the long-term panel studies is whether the questionnaire items should be removed or modified in consecutive waves due to the results of pre-testing. The answer to this dilemma stemming from the experience described in this paper is complex. First, we suggest that the questions causing (a) basic difficulty in answering them due to logical construction, and (b) great controversy about the meaning of them, should be removed from the questionnaire. In our case, the examples of such questions deal with ranking of intensity of conflict among pairs of social groups, and self-assessed social position in the future. Second, if respondents are able to answer questions on logical grounds and the discrepancies in meanings attached to some concepts observed in pre-test are not systematic, the questions should be retained in the original form and the material from the pre-

testing should be used for expanding fieldwork instructions. In addition, a written report from the pre-test will allow the researchers to consider the results of the pre-test in the interpretation of substantive analyses of the main study. For questions pertaining to determinants of success in life and to social-group conflicts we suggest the use of control variables such as degree of interest in politics, and respondent's education. It may also be useful if researchers take into account questions asked to interviewers, by which they assess (in a subjective way) the respondent's degree of understanding of the questions.

Although our paper deals with the Polish Panel Survey POLPAN 1988–2013, the conclusions of it have ramifications for other studies. First of all, it shows that conducting pre-testing of consecutive waves of the long-term panel surveys is worthwhile, especially in the case of radical systemic change of societies. Thus, there is a need to develop the methodology of pre-testing of such studies. In addition, some questions analyzed in this paper are used, in similar form, in cross-sectional studies such as the *International Social Survey Programme* (ISSP) or the *European Social Survey* (ESS). Researchers exploring data from these studies may be interested in finding out what types of problems these questions pose. It would also be worth investigating whether these problems are specific to Poland, or are also present in other countries.

## NOTES

- 1 The paper was developed under the research project “Multidimensional Biographies and Social Structure: Poland 1988–2018”, financed by the National Science Centre (grant OPUS 2017/25/B/HS6/02697, PI: Kazimierz M. Słomczyński, co-PI: Irina Tomescu-Dubrow). Besides the authors of this paper, Jerzy Piotr Jabłoński, Krzysztof Lisowski, Anna Turner, Joanna Zakrzewska, and Marcin W. Zieliński conducted pre-test interviews used in this study. We thank our colleagues from the pre-testing team, including Kazimierz M. Słomczyński and Zbigniew Sawiński, who were involved in planning the pre-test discussed in this paper. We would also like to thank Kazimierz M. Słomczyński for his insightful comments. We thank the reviewers who helped us to clarify the nature of our paper. This article does not follow an experimental or quasi-experimental design (e.g. hypothesis – pre-test – manipulation – post-test). In particular, it is not aimed at examining how solutions implemented in March 2018 as a result of pre-testing influenced the main POLPAN survey conducted shortly thereafter. Instead we aim at presenting experiences related to the 2018 pre-test and solutions that have been adopted.
- 2 It was decided not to include in the pre-test older cohorts, or the youngest one, as separate versions of the questionnaire were planned for these cohorts.
- 3 In some cases, interviewers offered respondents 40 PLN for an interview, four times the hourly minimum net wage in Poland.
- 4 Debriefing was conducted by Zbigniew Sawiński who also prepared all materials for it.
- 5 The changes concerned different phrasing of the same items: “contacts with people with political influence” in 1988–1998, and “political influence” in 2003–2013; “innate abilities and talents” in 1988–2003, and “innate abilities” in 2008–2013.

- 6 The shape of distribution after transformation was preserved. Similarly, linear transformation of 10-points scales to 11-points scales preserves the main parameters of the distribution. Literature on advantages and disadvantages of using different scales and solutions applied for harmonizing responses is very extensive and we are not able to analyze it in this paper. We just want to mention two articles which deal directly with the issue of 10 and 11 point scales: Kalmijn 2013; Zuell and Scholz 2016.
- 7 Project “Experiences on the Labor Market, Risk of Unemployment and Probability of Returning to Work, 1988-2008: Integrating Quantitative and Qualitative Analyses” (NONWORK) financed from a Ministry of Science and Higher Education grant (NN116135339, administered by the National Science Centre 1353/B/H03/2010/39, PI: Irina Tomescu-Dubrow).

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## APPENDIX

## Annex 1

Interview number	Respondent's profession	R's age	R's gender	R's education
AT/1	business owner – online marketing	39	M	higher
AT/2	law firm manager	43	M	higher
AT/3	English teacher and translator	45	F	higher
WB/1	unemployed single mother	27	F	secondary
WB/2	dance teacher / researcher / post-grad student	30	F	higher
WB/3	shop assistant in a liquor store	44	F	vocational
WB/4	journalist / post-grad student / lecturer	32	M	higher
DŽC/1	one-man business – production of props for advertising and cinema and artistic furniture	42	M	secondary + 2 semesters of tertiary
DŽC/2	unemployed dancer, last occupation: caregiver for elderly	54	F	secondary vocational no maturity diploma
DŽC/3	shop assistant in a grocery store	49	F	vocational
MZ/1	manual worker – airport	26	M	secondary
MZ/2	kindergarten teacher	26	F	higher
MZ/3	manual worker	36	M	secondary
JZ/1	manual worker	42	M	basic vocational + 1 year of secondary vocational
JZ/2	currently not employed, home-maker (taking care of her child)	26	F	elementary (incomplete middle-school)
JZ/3	security guard	49	M	elementary
KL/1	construction, small business owner	49	M	secondary, no maturity diploma
KL/2	farmer, owns a farm specializing in pig breeding	62	M	higher
KL/3	woodcutter (forestry industry)	28	M	basic vocational
JJ/1	warehouse worker	28	M	higher
JJ/2	supermarket shelf stacker	33	M	elementary (incomplete middle-school)
JJ/3	assistant seamstress	49	F	elementary