Developments to automate and streamline data collection and support customers' needs

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Session 3: Future of Interview Modes and Interviewers

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Statistics Estonia

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Topics

- Automation and streamlining of **processes**
- Activities focusing on **customer-friendliness**
- Developments in the data collection **application**, insight into the new data collection application

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Automation of sending notifications to respondents

- Until the end of 2023, all notifications to regular social surveys' respondents were sent out manually.

- Notifications to Population Census 2021 respondents were sent out in an automated way and we wanted to use a similar solution for regular surveys.

- We started developing notification automation in May 2023 and first automated letters – CAWI reminders – were sent out in December 2023.

- Today, sending of CAWI reminders for all surveys collected in our main data collection application (VVIS) is automated, incl. writing of contacts in the application.

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Notifications to respondents

Manual notifications and CAWI reminders

- *Notifications, first letter to respondent*
  - e-mail – respondent has a working email address
  - paper – respondent does not have a working email address
- *CAWI reminders*
  - e-mail – to respondents with **not finished** questionnaire of household surveys (EU-SILS, HFCS because all households cannot finish questionnaire in CAWI)
  - SMS – last CAWI reminder when CAWI period lasts at least 2 weeks
- e-mails are sent **up to 2** email addresses of respondents
- Separate CAWI remindets to respondents with **not started** and **started** questionnaires
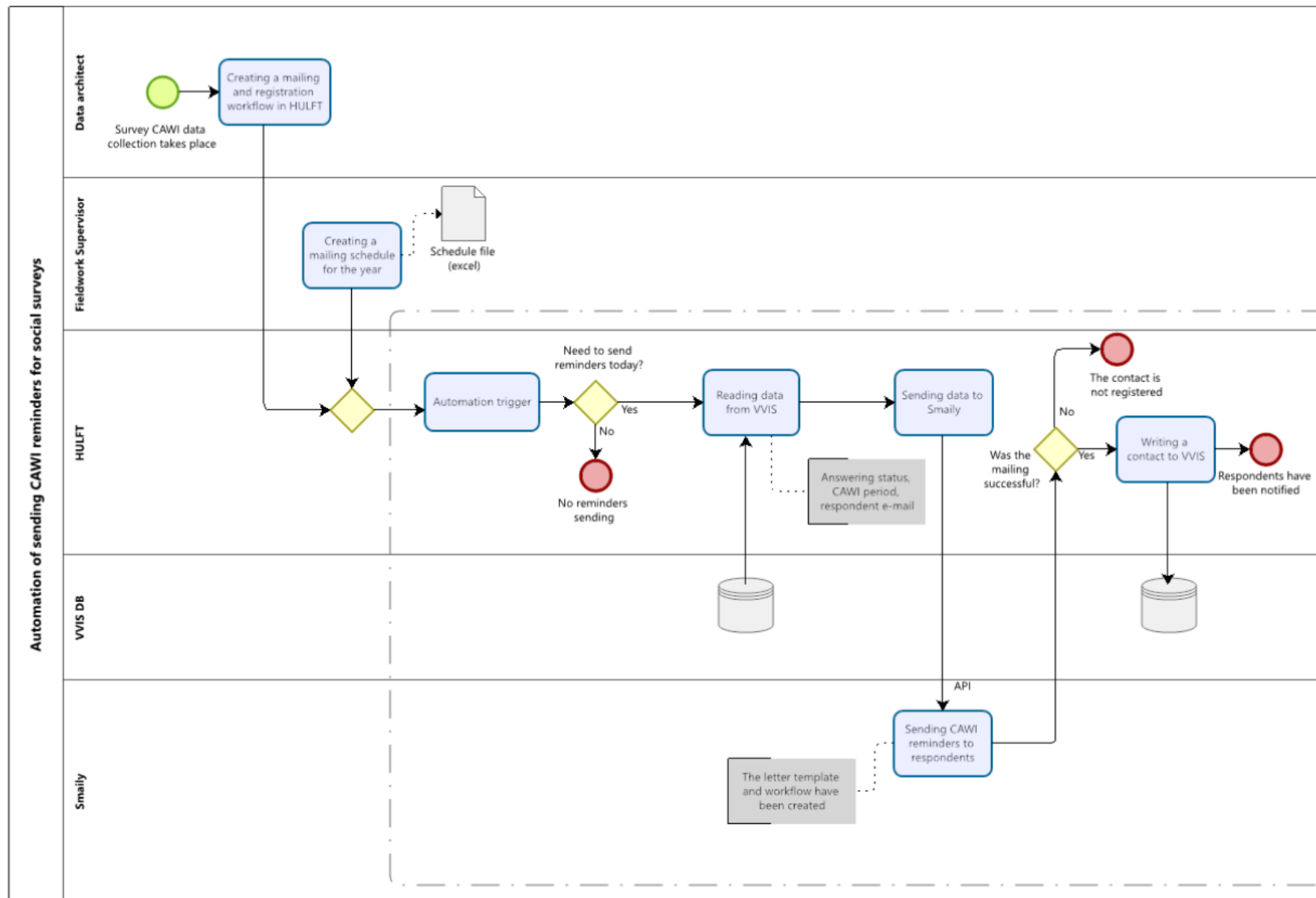- e-mails are sent out only on **working days**

Automated CAWI reminders

- e-mail – to respondents with **not finished** questionnaire (LFS, TS, ITH)
- e-mail – to respondents with **non-started** questionnaire of household surveys (EU-SILS, HFCS)

- e-mails are sent to **all** email addresses of respondents
- e-mails are sent out **every day**, incl. on weekends

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Notification workload

- In 2022, we sent nearly 170 different e-mails to survey respondents.

- With each manual e-mail sending, a total of 7 activities are performed in two departments.

- In 2024, we will send 80 automatic CAWI reminders in regular surveys.

- Automation needs the **schedule** and conditions of sending notifications and a **HULFT workflow** for sending and registering notifications, which are set **once a year**.

- Currently we are developing a new data collection application that will have built-in automatic sending of notifications and reminders.

- Therefore, we are carefully considering whether and what kind of notification automation is worth developing in addition to CAWI reminders.

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How automation works

Automation of sending CAWI reminders for social surveys

Data architect

Survey CAWI data collection takes place

Creating a mailing and registration workflow in HULFT

Fieldwork Supervisor

Creating a mailing schedule for the year

Schedule file (excel)

HULFT

Automation trigger

Need to send reminders today?

No reminders sending

Yes

No

Reading data from VVIS

Answering status, CAWI period, respondent e-mail

Sending data to Smaily

The contact is not registered

Was the mailing successful?

No

Yes

Writing a contact to VVIS

Respondents have been notified

VVIS DB

Smaily

API

Sending CAWI reminders to respondents

The letter template and workflow have been created

Using incentives in surveys

- In the past, we mainly used incentives in CAPI surveys, where the interviewer can give the respondent an incentive after answering the questionnaire.

- Now we are sending physical and electronic gift cards to CAWI and CATI respondents as well. The way of receiving the gift card is chosen by the respondent.

Receiving incentive	Contact needed	Usage
Post	Postal address	Prize draw, CAWI, CATI respondents, recipients of additional physical incentive
Parcel machine	Name of parcel machine and phone number of recipient	
Email	Email address	CAWI, CATI respondents
Handed after answering	-	CAPI respondents

- We conducted a public tender to select the provider of gift cards.

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Lessons learned in sending gift cards

- **Design of the questionnaire** is very important to ensure that the correct information needed for sending out the gift card is collected, and to avoid entering incorrect information or skipping important sections of questionnaire.

- If possible, **prefill information** already known (e.g. postal address, email and phone number in the population register) and **predisplay important elements** of contacts.

- If it is possible to enter the incorrect contacts, you need to **plan the time for correcting** the contacts before sending out incentives.

- Correct contacts are especially important when every survey respondent receives an incentive and the number of respondents is large.

- Some incentives do not **reach the respondent** and they have to be dealt with **repeatedly**.

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Activities focusing on customer-friendliness

- In 2023, interviewers started **testing** the **questionnaires** to avoid the complexities that occurred earlier.

- We also developed a **process** for ongoing **sharing respondents' and interviewers' feedback** with survey and questionnaire developers. If necessary and possible, changes to the active data collection questionnaire will be made.

- We are starting to offer respondents the opportunity to answer in **English** as a third language, in addition to Estonian and Russian. Initially, we will make the **CAWI questionnaire** and in the future we will also consider the possibility of answering the interviewer in English. The first CAWI questionnaire in English will be in use in 2025.

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Activities focusing on hard-to-reach parts of population

- Based on the response rate of the GBV pilot, we updated the **sample design** of male persons in the main GBV survey to collect more responses from males – the solution **worked very well** and we collected a sufficient number of responses from male participants.

- We tested an additional **paper notification** for all 80+ respondents in the Cultural Participation Survey. The paper notification was sent even when the respondent had a working e-mail address. In our experience, the additional paper notification had **no effect** as the number of responses and the response rate of 80+ persons was the same in both groups.

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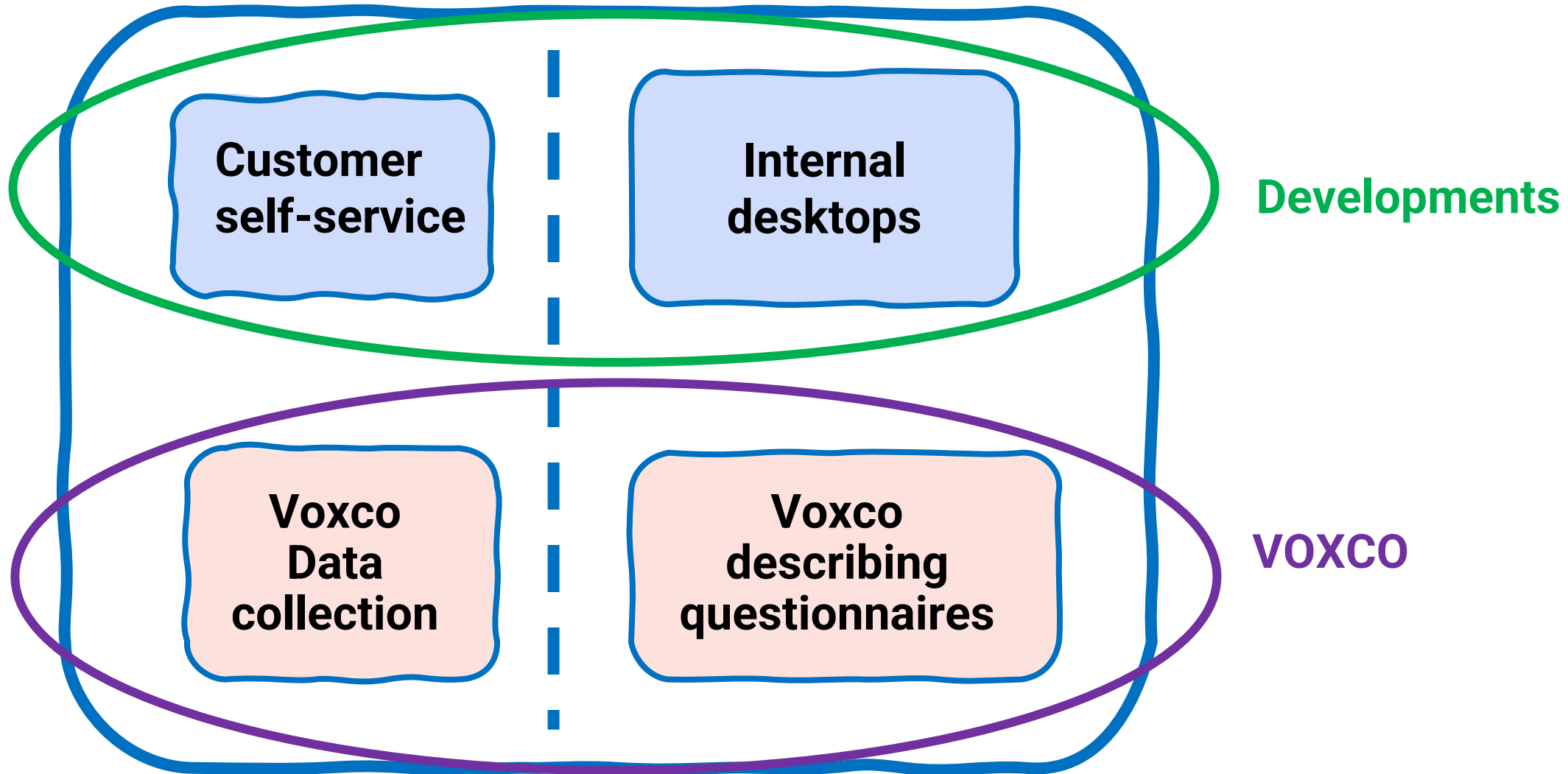# Developments in the currently used data collection application

To improve reliability and speed of the data collection application:

- Since 2023, we regularly **remove user roles** from completed surveys in the data collection application (VVIS).

- We **archive** (i.e. remove from the data collection application) the data of old years. This will reduce the volume of VVIS DB by almost 6 times.

To increase customer-friendliness:

- Developing the possibility for a **household member** to log into the data collection application

- Creating an option to authorise a household member in the questionnaire

- Adding household member authorisation guidelines to the notification letters

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Insight into the new data collection service

Customer self-service

Internal desktops

Voxco Data collection

Voxco describing questionnaires

Developments

VOXCO

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More information

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Thank you!

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