

# Colloquium: Survey Research Methodology

## Course Syllabus

**FS2020 – Adjusted for the WFH/COVID-19 situaion (March 24)**

Prof. Dr. Aya Kachi

Office: WWZ 3.35

E-Mail: [aya.kachi@unibas.ch](mailto:aya.kachi@unibas.ch)

Office hours: By appointment

### 1 Adjusted course information

VV-Nr: 43494/50768

Level/Type: Master's level, Seminar

Language of instruction: English

Term: FS 2020 (27.2.2020 - 12.3.2020) & (23.4.2020 - 23.5.2020)

Final exam: A two-day take-home exam during the period: May 15 (Friday) - May 22 (Friday)

Location and time: (1) Online materials at [www.ayakachi.org/survmeth](http://www.ayakachi.org/survmeth), (2) Q&A Zoom sessions, (3) Bilateral consultation by email or Zoom.

### 2 Course objectives and motivation (Adjustments added below)

The course is an applied methods colloquium taught at a master's degree level. The main goal is to prepare all of us for conducting simple research and writing a short version of an academic paper, using survey or survey-experiment methods. The course covers four major areas: (1) the nature of the survey response, including the typical psychology of attitude expressions, issues of question wording and context, and social desirability pressures; (2) general issues of quantitative research, including random and systematic measurement errors, and the logic of causal analysis; (3) implementing online surveys (experiments) with a convenience and a population-based sample, and (4) analyzing and interpreting treatment effects (for survey experiments) and learn how/what to report.

In the latter half of the colloquium (for full-module students – see Section 4), we, the whole class collectively, draft a survey experiment and field it with an appropriate sample of respondents. The topic of the class survey project will likely be within the realm of current energy, sustainability, or AI-related issues. (I will explain this in the first session.) After all, if we want to learn a method in the most practical way, which is to learn by doing, we need to agree on a single topic that is relevant to many of us. However, this should not prevent you from learning survey research methods even when your research interests lie outside of these topics. For instance, you might be interested more in marketing and international trade. In fact, I strongly encourage you to reflect on the methodology and the topics we cover in class with your own research context. If you have questions and thoughts related to survey issues in your own research area, please do not hesitate to share or ask in- and outside of the class.

Some technical points here. For learning about and conducting surveys and survey experiments, we will use Qualtrics as a survey software (which we will explore together in the course) and use R for simple statistics (e.g.,

for estimating experimental treatment effects). The course "Energy and Climate Policy–Citizens' Perspectives" (VV-Nr: 43030, offered in HS) is not a strict requirement but highly recommended before taking this course. Basic knowledge of sampling, statistics, and basic regressions (e.g. OLS and logit) would be useful. If you have any concerns about these prerequisites, please do not hesitate to talk to me at the beginning of the semester. We will try to find a way to fill the gaps.

Finally, I hope that you enjoy this creative process of survey research. The collective work in class naturally requires some coordination effort and hard work in and outside of the class, but collaboration and cooperation (and some compromises) are also the very reality of our research life. During these tasks, I do not want us to forget simple doubts or puzzles that we hold in our daily observations. *Why did (or did not) somebody vote/think/behave in a certain way? Why did he/she choose a certain product among hundreds of options? Why do we hold different perceptions on the same topic/product/policy?*

Public opinion studies are motivated by all these simple but fundamental puzzles around us and these studies turn the questions to more elegant and general scientific statements that can be tested empirically. Surveys and survey experiments are methods that enable us to test these mechanisms or opinion and attitude formation. As people's minds are complex, we have to be very careful in designing and wording surveys to make sure that what we ask is really measuring what we intend to measure. We will learn "how to" by doing it. Welcome to this exciting field.

### **Adjustments as of March 24, 2020**

Under the special work-from-home (WFH) situation in FS2020, I had to make major changes to the operation of this colloquium. I apologize for having taken a substantial amount of time getting my head around it. It was difficult, to say the least, and the extent of necessary changes has become greater than I initially expected. The colloquium is designed as an interactive course, which does not only mean there are many in-class discussions. What is more important is that we work on relevant software applications and exercises (e.g., data analyses) together and learn also from a number of different errors that each student encounters. We learn a lot from these case-by-case errors that sometimes depend also on operating systems. For these issues, I (and sometimes also my assistant) normally walk around the room and discuss together. This type of teaching or learning is simply not possible by meeting all together via Skype or Zoom weekly.

Therefore, I have decided to make the following (drastic) changes. I have been converting most of the learning modules to self-learning materials, including enriched (= more texty) handouts, audio guides, and video clips. I will also create additional materials that became necessary due to these changes. An example – When we work in the computer lab, a software application like "R" is installed on the desktop machine. Now many of us will have to rely on our notebook computers. For some, installing an application is a piece of cake but for others, it already generates multi-layered challenges. Some have Windows and others have Macs, meaning you all might have different questions on the same task! (Argh!) To accommodate these additional consultations, in addition to occasional Q&A sessions via Zoom with all of you, I will put more time in bilateral consultation, based on your own learning of the uploaded materials (i.e., handouts, audios, and videos). For simple questions, we will sort them by email. For more complex question, I will "meet you" bilaterally via Zoom by appointment through the semester.

For a similar reasons, working on a class survey project in a meaningful manner (not as a superficial exercise for the sake of "having done that") is difficult now. Therefore, I had to remove this part. I will spend this time on bilateral consultations to ensure a solid learning of the other parts as I mentioned above.

**We will resume the planned part (with the additional materials I just mentioned) on April 16, 2020.** This applies both to the 3KP and 6KP students. We will finish the course together. The final exam, which is now relevant for everybody will still take place around May 14 - May 24, 2020) as a take-home exam.

Thank you for your understanding.

## 3 Reading materials

### 3.1 Mandatory readings

- Learning in this colloquium is based mainly on course handouts, in-class discussions, and homework. Your participation is FUNDAMENTAL.
- This course assumes that students are familiar with the reading materials from the course “Energy and Climate Policy–Citizens’ Perspectives” (VV-Nr: 43030, offered in HS). For your convenience, these reading materials are available for download on ADAM (under the folder “03-ReadingMaterials”). ADAM Weblink: [https://adam.unibas.ch/goto\\_adam\\_fold\\_928336.html](https://adam.unibas.ch/goto_adam_fold_928336.html) or [https://adam.unibas.ch/goto\\_adam\\_fold\\_928341.html](https://adam.unibas.ch/goto_adam_fold_928341.html)
- In particular, the article by Bain et al. (*Nature Climate Change*, 2012) will be repeatedly used in this class as an example. We will need this for our replication exercise as well.

### 3.2 Potential resources for a survey method overview

As Handout 1 explains, in my view, there is no single textbook that helps us become a great survey researchers. (If you think otherwise, I would appreciate your input and suggestions!) This is why I use my own handouts in this colloquium. However, I would also understand if you say that you feel more comfortable to have a textbook next to you. Here are a few books I found partly useful. These are not required reading materials for the course.

- Fowler Jr, Floyd J. *Survey research methods*. Sage publications, 2013.
- Groves, Robert M., et al. *Survey methodology*. Vol. 561. John Wiley & Sons, 2011.

## 4 Adjusted module classification

Due to the forced WFH situation in FS2020, major changes became necessary. To keep the core learning contents intact, we will focus on the learning of survey-experiment data analyses. Unfortunately (very), for the full module (6KP), I had to remove the class project (making of an original survey or a survey experiment) from our colloquium activity this semester. I have explained this separately in my message to students.

Course title	Colloquium: Survey Research Methodology	Colloquium: Methods in Economics: Survey Data Collection and Analytics
Module type	Full version	Core version
Credit points	6KP	3KP
VV-Nr.	43494	50768
Difference?	<p>The course is originally designed for this "Full Version," the version that meets for 4 hours every week. Regardless of the module type, this course takes the form of learning-by-doing.</p> <p>The biggest advantage — supposedly the most challenging but most exciting part — of the full version is supposed to be the collective survey project we work on as a whole class. This means, after agreeing on a collective topic, we would design research using a survey (experiment), draft a survey (experiment) together paying attention to wording and respondents' psychological reactions, and fielding the survey in cooperation with a survey firm or university divisions, analysing the (real) survey data.</p> <p>Since the implementation of such a class project has gotten impaired by the WFH situation in FS2020, we will replace this section by additional tasks within the homework and final exam.</p>	<p>You have seen the initially-envisaged advantage of the extended version (on the left).</p> <p>However, I am also offering the "2-hour" version of the course as part of the extended version for MSD students. This module focuses on the minimum core of the survey and survey experiment method without losing the feel of hands-on learning.</p> <p>This version still involves a fair amount of software learning such as designing surveys with Qualtrics and programming data analyses with R.</p>
Adjusted final grade	<p>Homework assignments* (20%) Active participation (20%) Final exam* (60%)</p> <p>*The homework and exam will contain additional tasks, compared to ones for the 3KP module.</p>	<p>Homework assignments (20%) Active participation (20%) Final exam (60%)</p>

## 5 Final grade

Your final mark is on a regular 6-point scale. The final grade will not be curved, meaning that if all of you perform excellently throughout the course, then all of you could receive 6 points.

The main theme of this colloquium is to learn survey and survey experiment methods by doing it — now mainly by analyzing relevant data. Therefore, your active participation is a critical component of successful completion. This includes self-learning of all the materials and proactive questions you bring to the Zoom Q&A sessions or bilateral consultations. This colloquium is about simulating survey research and eliminate as many doubts as possible together. Whether in-class or through other channels, I still value active participation. (20%)

There are small homework assignments along the way. (20%)

For both modules (3KP and 6KP), there will be a two-day take-home exam during the period of May 14 - May 24. (60%)

Differences between the 6KP and 3KP module? Each homework assignment and the exam will have additional

tasks for the 6KP students to fulfill the course requirements. This will certainly not replace the learning one could have gained through a project – this is clearly one large compromise we have to make under the current extraordinary situation.

## Academic integrity

- It is your responsibility to familiarize yourself with the university's protocol regarding academic integrity. Instances of academic dishonesty will be referred to the Dean of Studies office (Studiendekanat) for adjudication.

## Topics covered (With major adjustments)

Last updated: March 24, 2020

	Date	Lecture topics	Tutorial & In-class activities	Homework assignments
1	27.2.2020	(1) Introduction and discussions on how we should proceed for the rest of the semester. (2) What is a survey? (3) How is a research project involving surveys?	Participate: HW 0: A short survey (10 minutes; Anonymous). Observe: (1) What survey was created last year? Discuss: (2) What do you think the researchers wanted to study based on this survey? (3) Any comments and questions about the survey draft?	(1) Read Bain et al. (2012).
	5.3.2020	No meeting: Fasnacht		
2	12.3.2020	(1) Summary of the survey results (HW 0). (2) What is a survey experiment? (3) Survey draft and codebook. (4) Survey infrastructure. (Software/Qualtrics, firm, sampling.) (5) Mechanisms of attitude formation. Frames / Cues / Cognitive biases.		(1) Create your Qualtrics account. (2) Check our Qualtrics accounts by looking at the shared HW0 survey project.
		No class: Major adjustments to the learning materials		
	16.4.2019	Self-learning with new materials resumes		
3	16.4.2019 (Suggested)	(1) <b>Zoom</b> Kick-off of the new "regime" (10:15-10:30) (2) Role of subjective & objective knowledge. (3) Challenges in science communication.	Exercise: Qualtrics input, functions.	

4	23.4.2020 (Suggested)	(1) Review of Bain (2012). (2) ATE estimation: Concept.	(1) R for first-timers. (2) <b>Zoom</b> Q&A (13:00-13:50)	
5	30.4.2020 (Suggested)	(1) Validity and reliability of measures. (2) Aggregation of multiple survey items.	(1) Estimating ATE with R. (2) <b>Zoom</b> Q&A (13:00-13:50)	HW1: Factor analysis with R by replicating an existing survey study. (Group work; Individual submission.)
6	7.5.2020 (Suggested)	(1) HW1 due May 7, 2020, at 14:00. (2) HW1's review/rough answer keys will be posted after 14:00.		
11	14.5.2020		(1) <b>Zoom</b> Q&A (10:30-12:00) (2) <b>Zoom</b> bilateral meetings upon requests (12:30 - 14:00)	
	14.5 – 24.5.2020		<b>Final examination.</b> Two-day take-home final examination for all. (Note: Auffahrt, 21.5.2020)	

## 6 Office hours

You are more than welcome to come to me and ask questions about the lecture, course materials, and related issues in person. Due to my irregular meeting schedule for other research and teaching activities, however, I am holding my “office hours” **by appointment**. Please do not hesitate to email me and make an appointment.