

Guide Notes/Help Notes

2001 Census Help Notes

Background

Census, as a self-administered questionnaire, is designed to be as easy as possible to complete so the majority of respondents should not need to refer to Help Notes. For the minority who consult them, the information needs to be helpful, easy to find and read.

To address Help Notes relevance, and fitness for use, a complete review took place after the November 2003 field test between December 2003 and March 2004.

Development objectives/plan

The objectives identified for the 2006 development were to:

- determine content in terms of the key messages and question-specific help to be included in the print version of the Help Notes that accompany census forms
- determine the best format for print version of the Help Notes
- identify ways that respondents can be encouraged to use the Help Notes.

To meet these objectives a comprehensive programme of testing was conducted including cognitive testing, analysis of data from field tests and the dress rehearsal follow-up survey results and consultation with key stakeholders.

Cognitive testing

The cognitive testing programme was conducted between April 2003 and May 2005 with respondents of varied age, gender and ethnicity. Interviewers observed respondent form-filling behaviour and asked a series of follow-up questions.

Respondents' use of Help Notes was monitored during rounds two, three and four of the cognitive testing programme.

Cognitive testing results

In all testing rounds most respondents did not consult the Help Notes. Some briefly scanned or looked at them while the tester explained the testing process before completing the forms. Respondents may have done this out of curiosity or due to a social desirability effect (wanting to appear interested and keen to complete the forms accurately for the tester).

Round two: June to December 2003

From over 70 cognitive tests, 11 people read or used Help Notes. Of those 11, five could not find information about the disability, income and main work activity of business/employer questions. Two found the information they were looking for and the other four said they read Help Notes out of curiosity or interest. A further 10 people briefly glanced at the Help Notes as the test process was explained by the interviewer – none of these respondents referred to Help Notes while completing the forms.

A recommendation to change the name from Help Notes to Guide Notes was made after round two testing because people are often loath to ask for or admit that they need help. The word 'guide' may help reduce respondent resistance.

For rounds three and four testing, instructions were added to some questions on the census forms that directed respondents to the Guide Notes for help in answering those questions.

To utilise the blank pages in the Māori/English questionnaire format and to reduce the load and weight collectors have to carry in the field, guide note text was incorporated into the Māori/English forms. This impacted upon the amount of information that could be contained in the Guide Notes and an abridged version was developed.

Round three: March to July 2004

Testing found that when respondents saw and followed the instructions on the form and consulted the Guide Notes, they were usually able to find the information they needed to answer the question(s) correctly. The updated and abridged version of the Guide Notes did not appear to hinder respondents' ability to answer census questions as intended.

Round four: November 2004 to May 2005

The instruction bubble and embedded instruction boxes added to the forms did prompt respondents who saw them to consult the Guide Notes. As found in round three, an abridged version of Guide Notes did not appear to effect the respondents' ability to answer census questions as intended. Some of the information respondents were looking for was not included in the Guide Notes because of space restrictions due to the abridged format or the inclusion of other information seen as a higher priority for data quality.

Information about civil unions was included in the Guide Notes text as testing showed that these new legal relationships were not yet fully understood by the general public.

Field test results

Field test: November 2003

Results of Help Notes use in the November test were analysed and the final conclusion and recommendation stated:

"Helpnotes – These continue as the primary form of help and as such are invaluable to improving the quality of responses, especially from the paper modes. Reducing the size of these since 2001 has had no discernible effect on the other help forms as far as increasing volume to them is concerned. It is recommended that they are kept in their current condensed format for June 2004 and beyond."

Dress rehearsal: 8 March 2005

Analysis of calls to the Helpline revealed that the largest number of calls was for help to answer census questions. Of those, the biggest percentage was for help answering the income questions.

The next largest number of calls was about the work questions.

The rest of the calls were spread across the questions on the individual and dwelling forms.

Dress rehearsal follow-up survey: March 2005

The follow-up survey of 271 respondents with respect to the Guide Notes found that:

- 27 percent of respondents made use of one or more of the help options, with 88 percent of these using the print version of the Guide Notes
- 86 percent of respondents who used a help option found the information they were looking for
- 30 percent of respondents used the income table to help them answer the 'total personal income' question.

Cognitive testing results, along with analysis of field test results, supported the inclusion of increased income information in the print version of the Guide Notes. The print version of the Guide Notes appeared to be used by the highest percentage of respondents, and providing an abridged version does not seem likely to increase the demand by respondents on the other forms of help available.

Changes made for the 2006 Census

For the 2006 Census the Help Notes have been renamed Guide Notes. An abridgement of the print version of the Guide Notes will be used. The format of the English-only print version of the Guide Notes will be one A3 sheet folded into thirds. The Māori/English guide note text has been incorporated into the Māori/English questionnaires to utilise the blank pages in that format. Embedded instruction boxes and bubbles have been used on the forms for key questions to encourage respondents to consult the Guide Notes.

Future Development

For the 2011 Guide Notes redevelopment it would be useful to review the:

- income information – did it help improve data quality for these questions? Any changes to the benefit system may need to be included
- need for information about civil unions and family trusts to ascertain whether this information is still required
- confidentiality statements to ensure consistency with Statistics New Zealand's confidentiality messages in 2011
- possibility of including more information about what the data from each question is used for, and by whom, to encourage respondents to answer census questions.

Analysing the calls made to the Helpline in 2006 will help identify where people are having problems. This analysis could then be used to determine what the most important information is for inclusion in the print version of the Guide Notes for 2011.