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Synchrony

Welcome to the latest and largest issue of *Harmonization: Newsletter on Survey Data Harmonization in the Social Sciences*. Synchrony, as defined by the Oxford English Dictionary (online), is "simultaneous action, development, or occurrence." Synchrony encapsulates how the ever growing community of scholars, institutions, and government agencies conducts the fascinating research on data harmonization. And since 2015, through this newsletter, we have broadcasted their knowledge and news. Time – and research and this newsletter – marches on!

This issue features new research. We begin with two articles on the meaning of survey items that do not refer to a specific time frame for respondents' past political behavior: what we call, "Have Done 'Ever'" items. In this mini-symposium, **Irina Tomescu-Dubrow, Josh Dubrow, Ilona Wysmulek, and Kazimierz M. Slomczynski** write about the history of, and logical limits in, the use of these items. **J. Craig Jenkins** and **Joonghyun Kwak** examine the connection between Have Done Ever items and protest event data. Next, **Joonghyun Kwak** explores the cross-national comparability of perceived immigrant-threat measurement. Then, **Bashir Tofangsazi** and **Denys Lavryk** reveal what it is like to hand code the documentation of over 1700 surveys. We round out the issue with news of the 2019 **Comparative Survey Design and Implementation (CSDI)** international workshop to be hosted by the Institute of Philosophy and Sociology, Polish Academy of Sciences, sessions at the next **ESRA** conference, and partnerships with The Ohio State University's **Translational Data Analytics Institute** (TDAI).

As with every issue of *Harmonization*, we welcome your articles and news. Please send them to the newsletter co-editor Josh Dubrow at dubrow.2@osu.edu.

In This Issue…

Articles

Have Done "Ever" Political Participation Items in Cross-national Surveys: Origins and Implications for Analyses

by Irina Tomescu-Dubrow, Joshua K. Dubrow, Ilona Wysmulek, and Kazimierz M. Slomczynski

This note focuses on political participation survey questions that do not specify a time boundary for respondents' past actions. We refer to them as Have Done "Ever" items. We trace the history of their inclusion in cross-national survey projects to contextualize their use as measures of political behavior in comparative research. In light of extant criticism leveled at attempts to explain individual or societal participation with this type of items, our aim is to generate discussion around how extant data collected with Have Done "Ever" could best be used, especially in the context of ex-post survey harmonization.

Democratization research consistently theorizes about the relevance of people's political participation for social processes such as democratic consolidation or democratic backsliding (e.g. Schedler 2001; Bunce 2003; Foa and Monk 2016). To measure political participation, many public opinion surveys ask questions that refer to peoples' past political behavior. Sometimes, they do so using a set timeframe within which respondents could have acted, for example, in "the last 12 months," "the last three years", or "the last five years." Other times, the period during which respondents could have engaged politically is left open, as the item formulation in the 1991 International Social Justice Project (ISJP) illustrates:

> "On this card are kinds of actions that people sometimes take to make their own views publicly known and to influence others when they see injustice. Please tell me if you have ever done any of these things over an issue that was important to you."
>
> Answer categories: 1 – Yes, 2 – No, 8 – Don't know.

Various formulations in how survey items define the past apply to a range of political activities, including membership in political party, signing petitions, joining boycotts or strikes, attending demonstrations, and other actions.

History of Have Done "Ever" in Cross-national Survey Research

The origin of Have Done "Ever" participation items is not well established, although the use of this formulation strongly influences substantive research on political behavior. As Biggs (2015) points out: "As a standard battery of questions [on political participation] is deployed in multiple surveys, it comes to define the phenomenon itself" (157).

The *Civic Culture Study, 1959-1960* of Gabriel Almond and Sidney Verba (1963, 1992) is the earliest cross-national project featuring the Have Done "Ever" items that we found. The questions refer to various actions described in the literature as conventional political participation (e.g. Marsh and Kaase, 1979), such as voting and attending political meeting and rallies. According to the study's codebook, respondents from Germany, Mexico, Italy and the United Kingdom were asked whether they were *ever* a member of a political party, while individuals in the US sample were asked whether they had *ever* been active in a political campaign (that is, whether they worked for a candidate or party, contributed money, or had done any other work in the campaign).[1] The answer options were *yes*, *no*, and *don't know*.

A few years later, Verba, Nie, and Kim (1978) conducted the follow-up study *Political Participation and Equality in Seven Nations, 1966–1971*.[2]

> "We are more concerned with participatory behaviors… than in participatory attitudes. We believe that participatory behaviors have a more immediate impact on politics and that they are somewhat easier to measure in a valid and reliable way across nations" (Verba et al 1978: Preface, xi-xii).

They focus on conventional forms of participation, and employ Have Done "Ever" items unevenly across national surveys. For example, the India (1966) questionnaire uses this formulation to ask about contacting government officials, party leaders, participating in political campaigns, and attending a political meeting or rally, among others.[3] By contrast, in the Austria study (1969) most participation questions have a fixed time frame for past behavior (the last two, or last three years, depending on activity). One exception is the item on whether the respondent had "ever been approached, in an organization or elsewhere, to sign a petition or other proposal?" (cf. Austria Codebook - 239. Variable is "SIGNPROP").

Then followed *Political Action: An Eight Nation Study, 1973-1976,* conducted in Austria, Finland, Italy, Great Britain, the Netherlands, the US, Switzerland and West Germany, which avoided Have Done "Ever" entirely. As the book *Political Action: Mass Participation in Five Western Democracies* (1979), edited by Samuel H. Barnes and Max Kaase, eloquently states, key to this study was measuring peoples' potential to act politically, specifically, the potential to protest, and not only peoples' conventional political participation:

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[1] Data and documentation available via ICPSR:
icpsr.umich.edu/icpsrweb/ICPSR/studies/7201/datadocumentation

[2] The project covered the United States, India, Japan, Austria, Nigeria, Yugoslavia, and the Netherlands.

[3] To illustrate, the 1966 India questionnaire asked: "*Have you ever attended a political meeting or rally, during an election or at any other time. (if yes) about how many times? (3) have gone more than twice; (2) have gone twice; (1) have gone once; (0) have never gone."*

> "What we wish to measure, then, is the individual propensity to engage in unconventional forms of political behavior as a means of political redress…This tendency is what we shall call 'protest potential'" (Marsh and Kaase 1979: 59).

Political Action, 1973-1976, included a series of increasingly severe forms of political protest, ranging from signing petitions and attending lawful demonstrations to the use of personal violence. The study asked respondents two sets of questions that would enable the connection of attitudes toward protest activities to actual behavior or behavioral intent.[4] Specifically, to capture affect, for each of the protest activities the study asked whether respondents feel that they "approve strongly, approve, disapprove or disapprove strongly" of this activity. To capture conscious behavioral intentions, for each of the activities the study asked:

> "Whether you have actually done any of these things on the cards *during the past ten years*. If not, the extent to which you feel you might do each of these things ["would do" or "might do"] or whether you would never, under any circumstances, do each of these things" (Marsh and Kaase 1979:70).[5]

The *italic* emphasis on "the past ten years" is in the original. While 10 years constitute a lengthy period of time, they form nonetheless a bounded interval. It seems that in the Barnes and Kaase *Political Action, 1973-1976* study, "have done" was not meant as "ever."

The researchers developed country-specific Guttman scales for both the attitudinal (affect) items and for the "conscious behavioral intent" items.[6] The two scales were then combined into an indicator of political protest potential (for details, see Marsh and Kaase 1979:65-81; also Codebook, p. 446). *Political Action* included also a series of items about conventional political participation, worded in terms of frequency of participation (e.g. How often do you attend a political meeting or rally; with response options: often, sometimes, seldom, never, don't know) that were also cumulatively ordered.

Political Action II, headed by Kent M. Jennings and Jan W. van Deth*,* was conducted 1979 -

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[4] The protest activities were: Signing a petition; Joining in boycotts; Attending lawful demonstrations; Refusing to pay rent or taxes etc; Joining in wildcat strikes; Painting slogans on walls; Occupying buildings or factories: "sit-ins"; Blocking traffic with a street demonstration; Damaging things like breaking windows, removing road signs, etc.; and Using personal violence like fighting with other demonstrators or the police.

[5] The item wording, according to the study's codebook, is as follows: "*Finally, please place the cards on this scale to show me, first, whether 1) you have actually done any of these things on the cards during the past ten years; 2) you would do any of these things if it were important to you; 3) you might do it in a particular situation or 4) you would never do it under any circumstances*." Political Action: An Eight Nation Study, 1973-1976 (ICPSR 7777)

[6] Using respondents' answers to a set of binary items, Guttman scaling aims to derive a single dimension on which both the questions and the respondents can be positioned. The position of the items and respondents can then be used to provide them a numerical value (Abdi 2010).

1981 in West Germany, the Netherlands and the US. It was a continuation of the original *Political Action* that contained the same structure of attitudinal and behavioral items needed to construct a single protest potential indicator with affective and conscious behavioral intent dimensions. Like in the original *Political Action,* the time frame for unconventional protest actions was "past ten years."[7] Conventional political participation was worded in terms of frequency of participation.

The use of Have Done "Ever" takes off in earnest in 1981, with the *World Values Survey*, WVS, and also its 'sister' project, the *European Values Survey, EVS* (Biggs 2014: 146). WVS/EVS launched in 1981 in 14 countries. Following the example of *Political Action,* it had a list of sequentially severe forms of political protest.[8] However, it dropped the affective dimension of protest potential, keeping only items pertaining to the conscious behavioral intent dimension. Regarding these latter, WVS/EVS dropped the wording "past ten years" from the items. The original, 1981 WVS questionnaire, reads:

> "Now I'd like you to look at this card. I'm going to read out some different forms of political action that people can take, and I'd like you to tell me, for each one, whether you have actually done these thing [sic], whether you would do it, might do it or would not, under any circumstances, do any of them."[9]
>
> Answer categories: 1 – Have done, 2 – Might do, 3 – Would never do, V- Don't know.[10]

By not providing any time boundary for when respondents' past action should have occurred, respondents could go as far back in time as they could remember. This way, "have done" became "ever" although "ever" was not explicit in the question wording (see also Saunders 2014; Biggs 2015). Later in this note, we will return to this implication also in relation to the "never would do" response option.

While WVS did not pioneer Have Done "Ever" political participation questions, once it adopted this formulation, subsequent international survey projects followed suit. Using information from the SDR Database v.1.0 (Slomczynski et al 2017), Figure 1 plots, for the time span 1966-2010, the cumulative percentages for the Have "Ever" *Attending Demonstrations* question.[11] Among the 22 major international survey projects in the SDR 1.0 database, 13 (59%) of them, with a common total

[7] Political Action II dropped 'Painting slogans on walls' from among protest activities.

[8] The activities listed were: Signing a petition; Joining in boycotts; Attending lawful demonstrations; Joining unofficial strikes; Occupying buildings or factories; Damaging things like breaking windows, removing roads sings, etc; and Using personal violence like fighting with other demonstrators or the police.

[9] WVS also switched the order of some fixed choice responses. In *Political Action*, the order was Have Done, Would Do, Might Do, Would Never Do.

[10] Questionnaire available at worldvaluessurvey.org/WVSDocumentationWV1.jsp

[11] In the SDR dataset, the target variable T_PR_DEMONST_FACT is coded 1 if respondents reported attending demonstrations, 0 = else. To identify the Have Done "Ever" incidence, we use this variable together with its harmonization control, C_PRDEMONST_YEARS. For full description of these indicators, see Wysmulek and Oleksiyenko p.77-89 in Slomczynski et al (2016).

of 676 national surveys, contain the Have Done "Ever" item.[12] These international survey projects are: Afrobarometer, Americas Barometer, Asia Europe Survey, Comparative National Elections Project, Eurobarometer, European Values Study, International Social Justice Project, International Social Survey Program, Latinobarometer, Life in Transition Surveys, New Baltic Barometer, Values and Political Change in Post-Communist Europe, World Values Survey.[13]

The 676 national surveys asking about Have Done "Ever" represent 59% of the 1,144 surveys with measures of respondents' participation in demonstrations included in the SDR 1.0 database. We note here that the 22 projects in the SDR database v.1.0 do not constitute the universe of extant cross-national studies with measures of participation in demonstrations. Selection of projects and their surveys to the SDR database v.1.0 conforms to a set of criteria, which is listed in Tomescu-Dubrow and Slomczynski (2016, 64). Still, the breadth and depth of the SDR data provide good insights into the prevalence of Have Done "Ever" political participation items across time and major academically-grounded international projects.

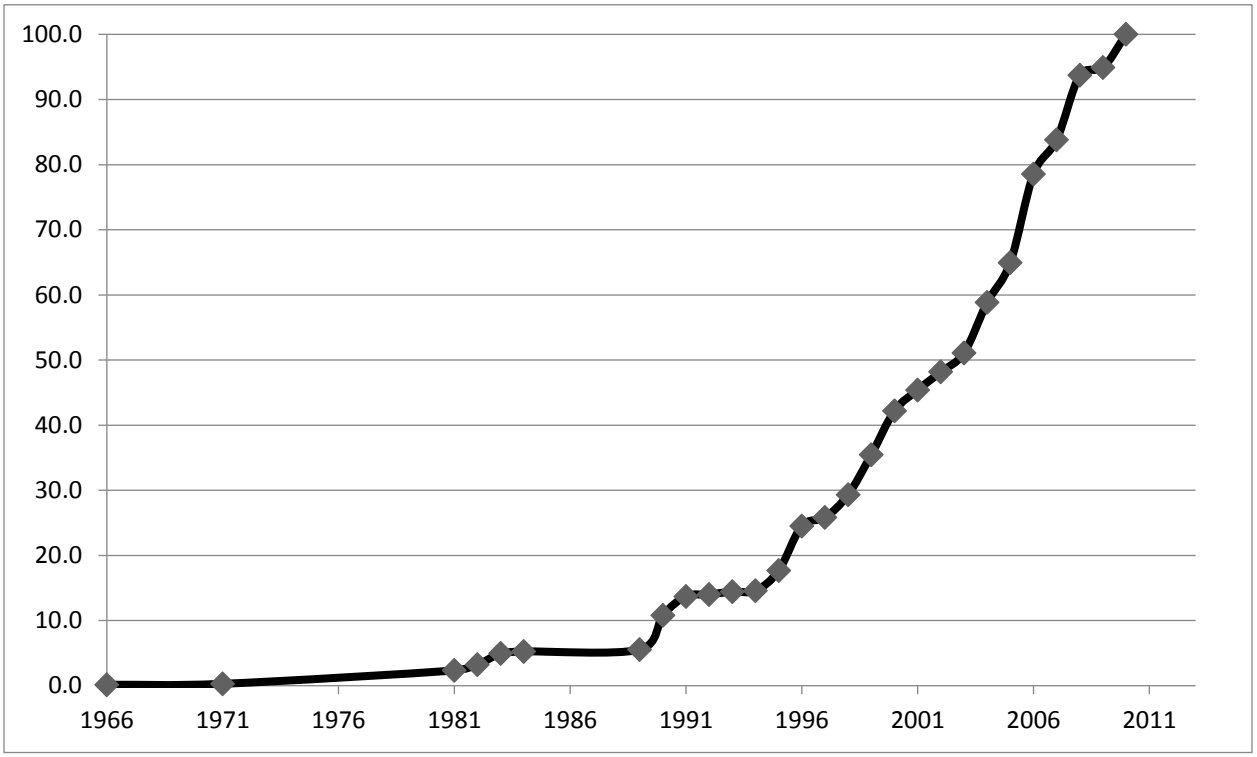

Figure 1. Cumulative Percentage of Surveys that include the Have Done "Ever" Political Participation Item of "Attending a Demonstration," 1966-2010 (n surveys = 676)

[12] Within these 13 projects some of their national surveys may use item(s) with set timeframe for past participation in demonstrations, or may contain both Have Done "Ever" and Have Done within given period.

[13] The nine international survey projects in the SDR database which use only a defined timeframe for Have Done are Asian Barometer, Arab Barometer, Caucasus Barometer, Consolidation of Democracy in Central and Eastern Europe, European Quality of Life Survey, European Social Survey, Political Action II, Political Action: An Eight Nation Study, Political Participation and Equality in Seven Nations, 1966–1971.

What Does the Have Done "Ever" Political Participation Item Measure?

Let us consider what Have Done "Ever" could measure in terms of political participation when taken on its own, rather than paired with "would do" or "might do." The idea here is to tease out the logic that could suggest empirical tests. To see what researchers employing the item claim to measure with it would require a systematic cross-check against the extant literature.[14]

We see three possibilities:

(a) Have Done "Ever" captures behavior and encompasses the respondent's lifetime (as recently and as far back as they are able to recall);

(b) Have Done "Ever" captures an attitude, namely respondents' propensity to participate based on their implicit approval of a given type of political action;

(c) Have Done "Ever" captures both behavioral and attitudinal components.

These interpretations have different methodological implications. We can say that, insofar (a) or (c) would hold, it is not reasonable to employ time-varying independent variables (or controls) or time-lagged indicators to explain Have Done "Ever."

If Have Done "Ever" would capture (b) attitude, both time varying and lagged variables could be used to predict the outcome. In the absence of empirical analyses showing that Have Done "Ever" can be treated as an attitudinal measure, researchers would have to justify on theoretical grounds why and under what conditions this assumption could hold.

It is likely that Have Done "Ever" contains at least some attitudinal component, as in (c). We note here that "have done" is derived from a possessive construction of the type "have-perfects" occurring only in a minority of languages (Dahl and Velupillai 2013). In most languages, "have done" must be translated through the simple past tense. As such, if respondents answer the question positively one might assume that they report behavior (i.e. they "did" a political action). However, the strong implication of the notion "ever" in the item wording raises the possibility that people would also report past intent. First, the political participation item does not include any time boundary for when respondents' past action should have occurred and respondents can go as far back in time as they can remember, i.e. "ever."

Second, "ever" is in juxtaposition to the term "never," explicitly provided as an answer option ("would never do"). In linguistics, the opposition "ever-never" belongs to so-called "polarity items," by definition referentially vague. These items are present in all natural languages, although their sematic and syntax properties differ (Giannakidou 2007). Speakers use them without clear lines of

[14] In a more ambitious project, one would apply principles of measurement theory (e.g. Crocker and Algina 2006) to assess the soundness of this item and follow up on respondents' interpretation of the item's meaning using qualitative research methods.

demarcation of their meaning and with fuzziness of what is between these opposite poles and how far these poles extend. Thus, one could argue that the Have Done "Ever" item wording – by providing no boundary for the past yet invoking "never" explicitly - may prompt people to recall as behavior past actions and also intentions they had, long ago, to participate in these actions.

Problems with Using Have Done "Ever" as a Measure of Political Behavior

In this section we briefly discuss limitations that Have Done "Ever" measures, interpreted in terms of behavior, pose for statistical analysis. We acknowledge the work of Saunders (2014) and Biggs (2015), who have sharply criticized using survey responses to the Have Done "Ever" item as an individual-level dependent variable measuring behavior, or, in aggregate form, as an indicator of population characteristics to show cross-national and over time trends in political participation.

One issue that Saunders (2014) points to, drawing on the work of Dekker et al (1997, as cited in Saunders 2014:577), is that the Have Done "Ever" question underestimates the level of protest in countries where a small activist minority frequently engages in protest. Conversely, overestimates would occur in countries where a higher number of activists protest infrequently.

Another problem to consider is that the measure usually leads to the exaggeration of the degree of protest behavior across time (see also Biggs 2015). As Saunders (2014:577) puts it:

> "This is because there is a cumulative effect at work here. Thus, someone who engaged in just one street demonstration in 1974 would be added to the aggregate total of those 'having done' 'attending lawful/peaceful demonstrations' in recently collected data. Inevitably, this will indicate an increase in the proportion of people having engaged in protest over time, and to the exaggeration of a rising trend in protest participation."

To further illustrate, consider that in 2018 a survey interviewer asks a 65 year-old respondent from Poland if they have ever attended a peaceful demonstration. The respondent could have participated the day before the survey was conducted, or they could have done so in 1988, at the age of 30. If the respondent interprets "have done" as referring to their attending a demonstration in 1988, 30 years before 2018, several of the respondent's characteristics likely changed: they surely got older, but also their occupation could have changed, most likely their income did, and possibly also their level of interest in politics. Moreover, many features of the national context within which this person lived changed, too. Among the most obvious would be levels of standard of living, economic development, and economic inequality. Even the political system changed, from the obvious radical transformation occurring just after 1989, through adapting legal provisions of the European Union to recent shortcomings in how some democratic institutions function.

Because it is not possible to know when the respondent engaged in the reported political action, trying to explain with time-varying independent variables Have Done "Ever" in behavioral terms – whether at the individual or at the contextual level – is logically untenable. Doing otherwise allows

that the effects of the hypothesized causal factors would precede their occurrence. Saunders (2014) phrases the problem forcefully:

> "Should scholars persist in creating statistical models in which the dependent variable measures something that may have taken place over thirty years ago, as with the EVS and WVS questions, or as in the case of CSES within the 'last five years or so,' and the independent variables measure current values and attitudes toward the institutions of government, it is impossible to infer any causality whatsoever." (Saunders 2014: 577)

Neither can we construct time-lagged correlates: we have no idea how long the lag should be. One could argue that the temporal ordering of cause and effect could be safeguarded under the assumption that given individual or contextual characteristics, while theoretically time-varying, are in reality stable. Nonetheless, such a solution would require a strong justification for the claim of constancy behind each of the selected variables, and would, for all practical matters, eliminate any claims to dynamic analyses.

Conclusion

Setting aside difficulties related to the use of time-varying covariates, to treat Have Done "Ever" as a valid and reliable measure of behavior requires the conviction that in a survey situation respondents accurately remember former political activities for a boundless period of time. This is easier to imagine for young respondents, whose actions occurred sometime after childhood, in a not yet distant past. But "remembering is an ongoing process of reconstructing relations between past and present" (Keightley 2010:64). As we age, things we may have wanted to do can appear as if we actually did, especially if colored by our current political preferences and valuation of political participation. Then, there is the issue of social desirability that, to the extent to which we live in societies that value political action, is likely to positively influence answers to Have Done "Ever", also as we age. After all, how comfortable will we be saying that for most of our lives we just stood by, watching others act?

Yet, for all the challenges that Have Done "Ever" items pose, for various periods and countries they are the sole available indicators of political participation. This, together with the sheer effort, intellectual and organizational, that went into producing and disseminating the numerous cross-national surveys employing this formulation, are strong incentives to find how extant data collected with Have Done "Ever" items could be used soundly.

An account of how Have Done "Ever" items can be used is beyond the scope of this article (but see Jenkins and Kwak 2018, this Newsletter). However, we would like to encourage the reader to consider this problem in the context of the SDR database and the ex-post harmonization of survey items on political participation. As mentioned earlier, the SDR database v.1.0 contains 1,144 national surveys with questions about attending demonstrations, of which 676 use the Have Done "Ever" wording. The source items refer to participation in demonstrations – either actual or potential, and

the question wording varies in terms of time boundaries (predefined or "ever"), the nature of demonstrations (e.g. legal or illegal), and their purpose (e.g. demonstrations about the environment).

In SDR 1.0 we proposed two target variables referring to (1) declared past participation and (2) potential participation, which captures declared past participation or willingness to participate. Such target variables need to be accompanied by harmonization control indicators, to account for properties of the source survey items. For example, in SDR 1.0 the following control variables are available for participation in demonstration targets: (1) *Demonstration time*: indicates the time span when demonstrating was supposed to occur; (2) *Demonstration extended*: indicates whether the source question or set of questions asked about other activities, such as marches, protests or sits-in, in addition to demonstrations; (3) *Demonstration illegal*: indicates whether information about the legal character of the demonstration was included in the wording of the source question; (4) *Set of questions:* this control allows users to check for those instances when a given survey "divides" the question about demonstrations into a subset of questions (for details on harmonization, see Chapter 4 in Slomczynski, Tomescu-Dubrow, Jenkins, et al. 2016). As the SDR team works on the new, extended database, we also sketch new possibilities for harmonizing *ex-post* political participation variables. We explore ways to combine behavior and attitude explicitly, which may allow for a better use of the source information from political participation items in the SDR Project.

We invite researchers to formulate the conditions under which Have Done "Ever" items can be used as indicators of past behavior, attitudes, or the combination of both.

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Measuring Participation in Demonstrations: Using Event Data to Assess "Have Done" in Survey Research

by J. Craig Jenkins and Joonghyun Kwak

To address such issues as the "social movement society" thesis, the so-called "democracy deficit," and the impact of protest on democratization, we need a large inventory of comparable cross-national survey measures of participation in demonstrations that goes back in time over several decades, provides comprehensive global coverage, and can specify the timing of such participation in a yearly or near-yearly format. A critical step in creating such measures is to harmonize the "have done demonstrations" items that in various formats have been asked in surveys worldwide since 1966. In the preceding essay (Tomescu-Dubrow, Dubrow, Wysmulek, and Slomczynski 2018, this Newsletter), our colleagues have traced the complex history and debates surrounding this survey question and its interpretation. As they note, the largest coverage of this question appears in a form that lacks a clear time reference as to when such behavior occurred, applies a forced choice design that does not allow respondents to claim past participation while also expressing willingness to engage in future demonstrations, and uses inconsistent wording (e.g. simply "demonstrations" vs. "lawful demonstration," or "protest demonstration or rally") that make it challenging to harmonize this question.

This essay asks what we can learn about the responses to the standard question HAVE DONE "EVER" when we compare aggregate participation estimates derived from survey data with estimates constructed from event data. Although survey and event data use quite different methods to measure participation in demonstrations and other protests, they should display significant convergence at the aggregate cross-national level. After all, both can be seen as asking what share of the population is engaged in demonstrations in a particular country and time period.

Here we outline a method and some results from comparing various measures of participation in demonstrations derived from event data with parallel survey estimates to see if we can better identify the timing of the survey-based participation estimated from this standard question. Our baseline comparison is between the annual percent of survey respondents who report having participated "ever" in a demonstration and, on the event data side, the share of adults in the country who are reported in news stories as participating in demonstrations during the same calendar year. In this exercise, our assumption is that responses to the classic HAVE DONE "EVER" survey item are reports about past behavior and so our fundamental problem is to better understand more about when this participation likely occurred. Since we know the year in which the event data reports participation, we can adjust the time coverage of both the survey and the event data measures to see what creates stronger correlations in aggregate country-level participation rates.

Data on Protest Behavior Reported in Surveys and Newspapers

National surveys provide a slow moving picture of population characteristics at a point in time by using representative sampling and formal interviews. Treated as a country aggregate, the classic "ever"

or lifetime measure asks how many respondents report having participated in a political demonstration at any time up until the date of the interview (treated in terms of calendar years).[15] Event data are more time-specific, identifying the 24-hour day on which a demonstration or other event occurred along with group or collective level information about who did what to whom, when, and where. The basic unit of data collection is the daily event that includes information about the actor(s) (including the number of participants), the type of event, the target(s), the date and location of the event, and the issue or concern underlying the event.

By a *demonstration*, we mean any public assembly, march, or rally that protests or challenges something, such as a policy, a leader, an institution, another group, or an idea. With survey data, the major methodological challenge is to assess biased responses and the representativeness of the sample. For event data, one is relatively confident that a demonstration actually occurred but one does not know how many other demonstrations were unreported in the dataset. Studies suggest that single national newspapers, such as the *New York Times* or *Washington Post,* may report as few as 10% of all real world demonstrations. Newspapers have limited reporting space (i.e. the "newshole") and market considerations play a major role in deciding what events are sufficiently "newsworthy" to be reported. In general, large events, those that are contentious and/or violent, and those with organizational sponsors, police, or counter-demonstrators are more likely to be reported (McCarthy, McPhail and Smith 1994; Earl McCarthy and Soule 2004; Ortiz, Myers, Walls and Diaz 2005; Hutter 2014). The best way to improve event coverage is to integrate multiple news sources. In our exercise, , we use a multi-source cross-national data set that relied on over 400 newspaper to significantly reduce problems with selective coverages .

Our event data measures come from the European Protest and Coercion Data (or EPCD; see Francisco 2018), which covers 28 European countries from 1980-1995 and, as mentioned, uses over 400 newspapers available through Lexis-Nexis and the Reuters Textline library. EPCD covers the time-period when the problematic "have done ever" question was the only survey question available. Using calendar years, we aggregate the daily event participation estimates to create annual event exposure measures and then normalize against the adult population aged 15-64. For multi-day events, we use only the highest reported participation estimate because we assume that the participants on successive days were largely the same people showing up again to demonstrate. Insofar as new participants were involved, this makes our estimates conservative. Demonstrations include events described in the news stories as "demonstrations" as well as marches, rallies, and vigils that involve public assembly and have a protest or challenging quality.[16]

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[15] The statistics presented below deriving from the SDR database 1.0 (Slomczysnki, Jenkins, Tomescu-Dubrow, Kołczyńska, Wysmułek, Oleksiyenko, Powałko, and Zieliński 2017) are weighted to insure that all respondents have an equal chance of being represented in the pooled statistics. This weighting was calculated using survey weights provided by the original projects and then recalibrated to make the mean of weights equal to 1 and the sum of weighted cases equal to the total sample size in the SDR data.

[16] We reviewed the original news stories for all EPCD vigils and found three large events that were governmentally organized and large in size but did not involve public assembly. We therefore excluded these three events as lacking a "protest" quality. Two were extremely large (over three million participants), one on March 10, 1986

How to Compare Survey and Event Data Estimates

The first step is a baseline analysis of demonstrations that compares the annual country-year rate of HAVE DONE "EVER" (lifetime) for adults based on the SDR data[17] against the same country-year EPCD measures of adult exposure in demonstration. In this comparison, we treat "ever" as occurring in the immediate past year, which we then match against the news-reported event exposure rate. We use bivariate correlations among these cross-national participation rates to assess convergence, which judging by past research should exhibit at least a modest correlation (e.g. Dalton, van Sickle and Weldon 2004). Our analyses of the bivariate correlation between the SDR data and EPCD show that for all matching country-year measures (N = 50) the correlation is 0.554, which indicates a moderate level of convergence between the survey and event participation estimates.

We also break down these measures by years as well as by survey program to see if there are major differences along these lines. Specific years and survey programs show a large variation in the extent of convergence. By time period, in the early years 1981–1984 (with number of surveys N = 22) the measures are weakly correlated (r = 0.246) while in the later years 1989–1995 (N = 28) they are strongly correlated (r = 0.709). There are also significant differences between the survey programs, with the International Social Justice Project (N = 7) showing the strongest between-measures overlap (r = 0.842), followed by the World Values Survey/European Values Survey (N = 36, r = 0.597), and the Eurobarometer (N = 10, r = 0.238). Although in the case of the Eurobarometer surveys, a small number of surveys makes it difficult to draw a general conclusion, the weak overlap of the measures raises questions about usefulness of including these surveys for future analysis.

Are the survey respondents working with a different conception of what constitutes a "demonstration" than is being used by the event data measure? Perhaps survey respondents are thinking more broadly by including general and other strikes because these events typically involve marching, rallies, and other public demonstration activities. To address this, we added event data estimates for general and other strikes to our demonstration measure, but this produced significantly weaker correlations than the original baseline (r = -0.002 for general strikes and 0.265 for other strikes included). Another possibility is that survey respondents are not thinking of vigils, marches, or rallies in their responses. To address this, we removed these event forms from our demonstration measure. We found that dropping marches, rallies and vigils from our baseline correlation did not change the correlation (r = 0.549, 0.547 and 0.557, respectively).

We next experiment with three temporal adjustments to these baseline measures to see if these alter the correlation. One hypothesis is that our surveys are tapping participation that occurred over

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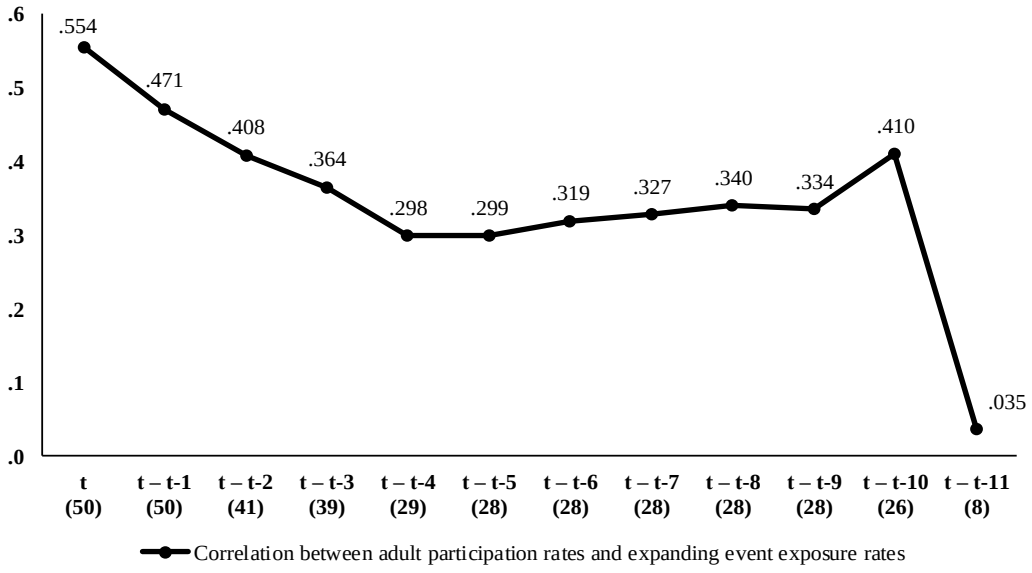
organized by Swedish parliament to mark the death of Prime Minister Olaf Palme and the other on November 15, 1987 organized by local government officials in Northern Ireland to mark the 74 victims of the Enniskillen, Northern Ireland bombing by the Provisional IRA.

[17] There are also variations in the language of the questions, such as "lawful demonstrations" and the use of a separate "have done" question, which we treat as identical for our purposes.

an earlier time period, potentially a lifetime, starting with the year of the survey and gradually expanding back to the full past 15 years of available event data. The contrasting hypothesis postulates that in these surveys people are reporting current behavior. To test these hypotheses, we add additional years of event data to the correlation with the single-year survey measure for "ever." If the additional event data-years strengthen the correlation, then it suggests that the survey-reported participation may have occurred over a longer time period (support for the first hypothesis); if by expanding exposure the correlation is smaller, then the opposite is true (support for the second hypothesis).

Figure 1 presents correlations from this experiment that contradict the first hypothesis. The strongest bivariate correlation between the SDR measure and the various EPCD exposure measures is the baseline measure. Adding additional years of EPCD event-based participation consistently lowers the correlation. The second hypothesis gains support: *respondents in the surveys are largely reporting about recent behavior from the current or the immediately prior year rather than behaviors that occurred in earlier years.*



Sample sizes of the country-year measures are in parentheses.

Figure 1. Correlations between Adult Participation Rates (15-64) from SDR and Expanding Event Exposure Rates from EPCD

Our extension of testing the second hypothesis is limited to the survey estimates for a specific birth cohort and then matching it against a similarly limited time period of event data participation. Making the assumption that people do not participate in demonstrations until they are 18 years of age, we begin the survey estimate with only 18 year olds and match these against event data exposure for only the immediately previous year. By progressively adding additional years to the survey age group (i.e. age 18-19, 18-20, …, 18-33) and, on the event data side, adding years to the EPCD estimate (i.e. 1980-1981, 1980-1982, …, 1980-1995), we allow respondents to report on demonstrations that occurred within a restricted time period.

Table 1 presents the design of this cohort or age group approach; it shows the SDR age groups for each calendar year for which we have survey data and the respective years of event data exposure that are summed up to match. For example, for 1990 we consider the birth cohort 1962-1972, that is those 18-28 years old in that year, assuming for them ten years of exposure (1980-1990).

Table 1. Comparison Design of Cohort Approach between SDR and EPCD

SDR			EPCD	
Survey year	**Birth year**	**Age**	**Event exposure**	**N**
1981	1962-1963	18-19	1980-1981	9
1982	1962-1964	18-20	1980-1982	2
1983	1962-1965	18-21	1980-1983	10
1984	1962-1966	18-22	1980-1984	1
1989	1962-1971	18-27	1980-1989	2
1990	1962-1972	18-28	1980-1990	18
1991	1962-1973	18-29	1980-1991	7
1995	1962-1977	18-33	1980-1995	1

Our analysis for the pooled country-year pairs (N=50) shows that the correlation by this cohort approach is significantly lower (r = 0.317) than the baseline (r=0.554). We then tested our hypothesis that most survey respondents report largely recent participation in demonstrations following the same method used in Figure 1 by dropping survey waves; see the bivariate correlations in Figure 2.

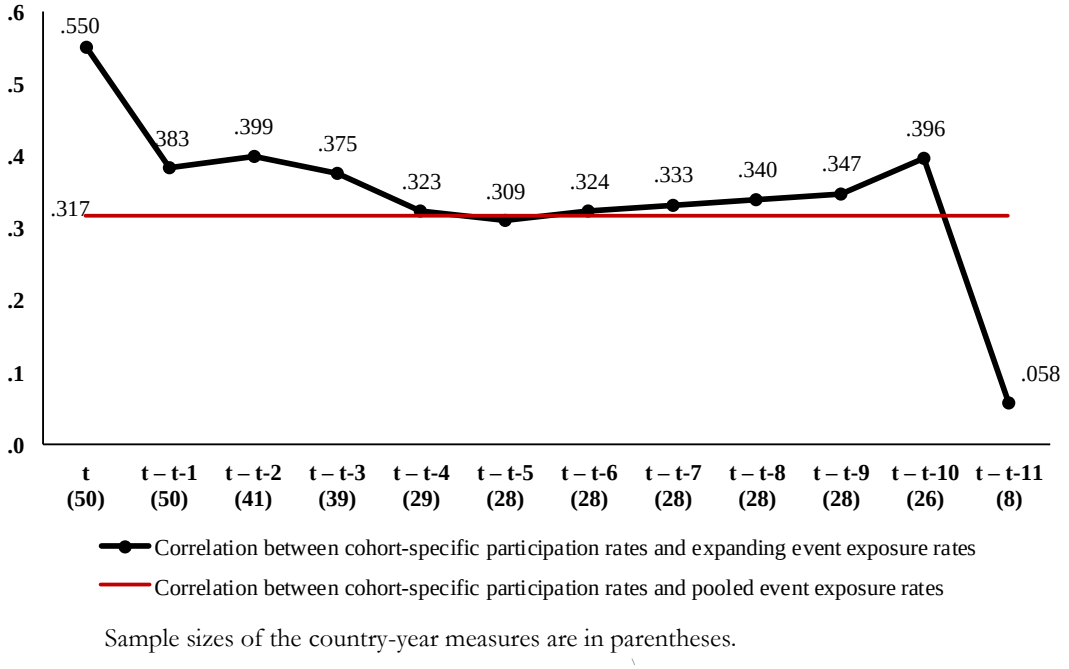


Figure 2. Correlations between Cohort-Specific Participation Rates from SDR and Expanding Event Exposure Rates from EPCD

The baseline correlation with the most recent event data is the strongest (r = 0.550), and the correlation declines with the addition of prior years of event data participation. This test also confirms that most survey respondents report on recent behavior and not reaching back into their distant past.

We also examine the idea of a protest wave that may have uniquely influenced specific birth cohorts in particular countries in our SDR data; their participation during a protest wave may have led to their persistent reporting of higher than average participation. By a protest wave, we mean "a phase of heightened conflict and contention across the social system that includes … intensified interactions between challengers and authorities" (Tarrow 1998: 153). In his work, Tarrow (1989) examines the demonstrations and protests of Italy's "hot Autumn" of 1968, showing that these protests spread gradually across the country and by the end engaged perhaps a quarter of the total population. In a retrospective survey, Opp, Voss and Gern (1995) found that over half (58 percent) of all respondents in the former East Germany reported participation in one or more anti-government demonstrations during the collapse of the German Democratic Republic in 1989. Thus, a protest wave may have lasting consequences for reports of protest by specific cohorts. The first step is to identify countries with protest waves. Using our EPCD data, Figure 3 traces annual adult participation rates for demonstrations in all of our 28 countries between 1980 and 1995, showing that several countries experienced a 1-year upsurge that was at least 3 standard deviations above the country's mean event exposure rate. Albania, Bulgaria, Czechoslovakia, Ireland, Luxembourg, and Poland experienced such exposure spikes while the other countries did not.

What is the relationship between these protest waves and our survey reports of participation? We begin with the assumption that young adults, those aged 18-30, are the most likely to participate in demonstrations, especially including during protest waves. Young adults are less committed to careers and families, have more flexible time schedules, greater education, and more exposure to recruitment efforts, all of which should contribute to the common finding of a negative linear relationship between age and protest participation. Participation in such a protest wave may have forged a political generation, i.e. an age cohort with a distinctive identity and set of experiences defined by participation in demonstrations. Such a "protest generation"—what we call a "wave cohort"—is likely to continue reporting higher rates of lifetime participation for many years after the protest wave. This experience may also be magnified among specific subgroups, such as college students, who are highly exposed to all the factors that make young adults more likely to participate, as Caren, Ghoshal, and Ribas (2011) found for the U.S.

How might this apply to our data? We use the SDR data to look at cohort-specific participation rates and their persistence across time by comparing "wave" and "non-wave" countries. For this analysis, we need at least countries with a protest wave and multiple SDR surveys five to ten years afterwards. Of our "wave" countries, Albania, Bulgaria, and Poland qualify, which we compare against Sweden that displays virtually no fluctuation in annual participation rates.

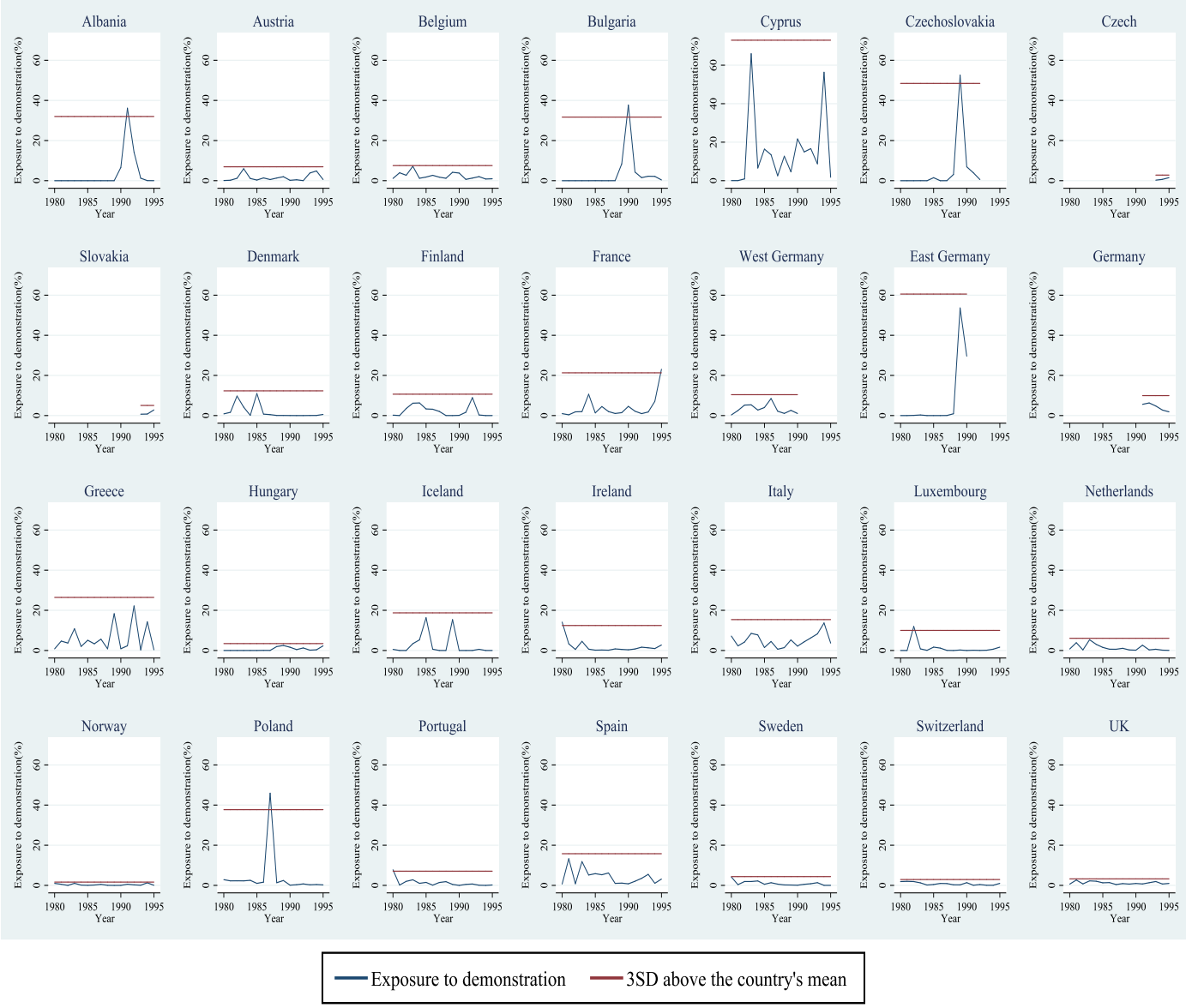


Figure 3. Annual Exposure to Demonstration Using EPCD, 1980-1995

Figure 4 shows the cohort-specific participation rates for these four countries. Albania (Panel A) has a protest wave in 1991 and we defined the wave cohort as those aged 18-30 in 1991 (the 1961-1973 birth cohort). This wave cohort has greater participation rates than the younger and older cohorts in several years, but this is not consistent over time. For Bulgaria (Panel B), the wave cohort aged 18-30 in 1990 (the 1960-1972 birth cohort) shows higher participation rates in all survey years except 1997, largely fitting our expectation. For Poland (Panel C), the wave cohort (the 1957-1969 birth cohort associated with the 1987 wave) shows higher participation rates in 1991, 1997 and 2008 but does not show them consistently. Sweden has no protest wave, so we used the 1960-1972 birth cohort for the wave cohort to make this comparable to Bulgaria and also matched the Albania and

Poland wave cohorts (not shown but available upon request). Panel D shows that Sweden displays no clear pattern of higher participation by any specific cohort.

Overall, our results are mixed: there is a clear support for the "wave thesis" only for Bulgaria and, negatively, Sweden. Perhaps protest waves mobilize a broader age distribution than young adults or there were additional protest waves after 1995 that affected our survey results. In Figure 3, there were several countries with smaller upsurges, suggesting the need to take into account a more continuous measure of protest waves than our 3 standard deviation measure. Clearly further analysis is needed if protest wave ideas are to contribute to this question.

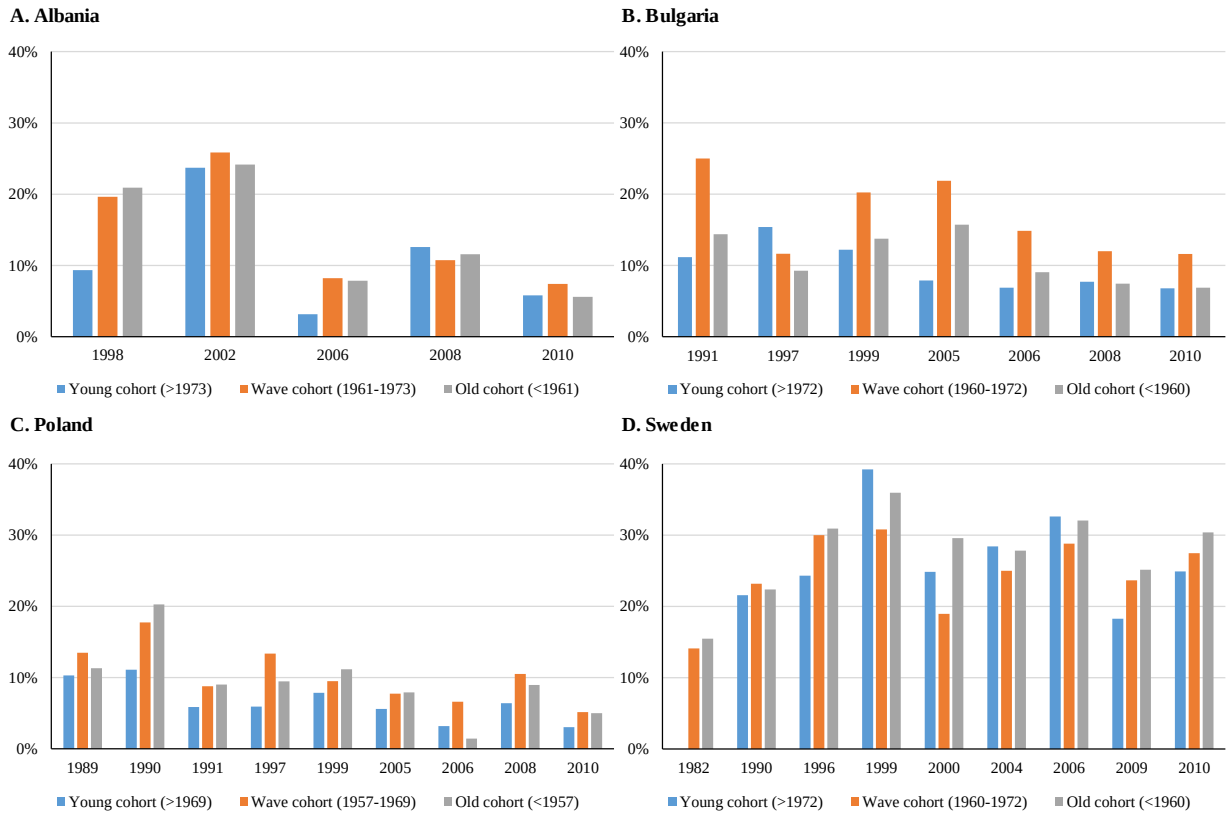


Figure 4. Cohort Participation Rates across Survey Panels (SDR Data), 1982-2010

Conclusions

Overall, we found that responses to the classic HAVE DONE "EVER" question are about joining demonstrations that appear to have occurred in the past year or two. Two of our exercises found evidence that the baseline correlation was stronger when focusing on recent reports of behavior and event participation. This might reflect an overreporting of participation in our surveys, especially where the massive size of events are triggering social desirability responses among respondents. In the protest wave analysis, we found some support for a "protest cohort" in Bulgaria, but other countries – Albania and Poland –with comparable protest waves did not display such a clear cohort

pattern. From these results, it does not seem that protest waves are creating distinct cohort effects that help clarify the timing of reported participation.

What are the next steps? We need to expand our time coverage to add survey and event data for the post-1995 period. One step is to make use of the Protest Event Dataset (Wüest, Kriesi, Makarov, Enggist, Lorenzini, Rothenhäusler, Kurer, Häusermann, Wangen, and Hutter 2018) that provides event data participation coverage for 30 European countries for 2000-2015. This will allow us to analyze this later time period to see if we find similar results. This will include using time-delimited survey questions (i.e. "in the past 12 months") that might create stronger correlations with event data measures. Here we focused on the earlier period because of the importance of disentangling the classic HAVE DONE "EVER" question.

With regards to possible overreporting of participation in demonstrations, to our knowledge this has never been investigated. The assumption has been that demonstrations are not part of the standard political repertoire, so overreporting is rare. But if demonstrations are becoming legitimate and normative, then this may no longer be the case. Perhaps massive events with, say, a million or more participants are encouraging a social desirability response and overreporting of participation. Such events make up less than 1% of our daily events, so one possibility would be to see if these massive events have an independent effect on a regression of the survey participation rate net of the EPCD participation rate.

Third, there may be improvements to the protest wave analysis. Several studies (Caren et al. 2011; Joly 2015; Quaranta 2016) have found significant cohort differences by using cross-classified mixed models applied to the U.S., Eastern Europe and Italy. This could be expanded comparatively by further comparison or in a big N analysis by pooling country measures and using hierarchical linear models and a continuous measure of protest volatility in place of the simplistic "wave v. non-wave" distinction. There is much to be done.

Acknowledgements

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Comparability of Perceived Immigrant-Threat Measurement across 22 Countries

by Joonghyun Kwak

A key problem in comparative research is testing to confirm that comparability of measurement exists. In an earlier paper, Kwak and Wallace (2018) examined the impact of the Great Recession on attitudes toward immigrants in 22 countries. In that paper, the individual-level dependent variable of perceived immigrant threat (PIT) was derived from a series of seven questions in the 2013 *International Social Survey Program (ISSP): National Identity*. Also, the country-level mean of 10-year lagged PIT was constructed from the same seven items in the 2003 ISSP round. These two constructs of PIT were developed using pooled exploratory factor analysis (EFA) on a dataset that combines all countries. This universal measurement model assumes that people in different countries respond to the same

question in systematically similar ways. However, a well-fitting EFA to the pooled data does not alone guarantee that the measurement is comparable across countries (Medina, Smith, and Long 2009). A lack of comparability of the measurement would make conclusions based on cross-national comparisons invalid because the measurement taps into different meanings across countries. Therefore, it is important to test the comparability of measurements before proceeding with the substantive cross-national comparisons (Davidov et al. 2014). As a supplement to Kwak and Wallace (2018), this research note compares pooled EFA with country-specific EFA to test if the universal measure of PIT is comparable across 22 countries.

Items and Methods

Seven items asking attitudes about immigrants from the ISSP construct PIT. The first six questions ask respondents how much they agree or disagree with the following statements: (1) *Immigrants increase crime rates*; (2) *Immigrants are generally good for* [COUNTRY'S] economy; (3) *Immigrants take jobs away from people who were born in* [COUNTRY]; (4) *Immigrants improve* [COUNTRY'S NATIONALITY] *society by bringing new ideas and cultures*; (5) *Legal immigrants to* [COUNTRY] *who are not citizens should have the same rights as* [COUNTRY NATIONALITY] *citizens*; (6) [COUNTRY] *should take stronger measures to exclude illegal immigrants*—1 = *Disagree Strongly*, 2 = *Disagree*, 3 = *Neither Agree nor Disagree*, 4 = *Agree*, 5 = *Agree Strongly*. The seventh question asks: (7) *Do you think the number of immigrants to* [COUNTRY] *nowadays should be*—1 = *Increased a Lot*, 2 = *Increased a Little*, 3 = *Remain the Same as It is*, 4 = *Reduced a Little*, 5 = *Reduced a lot*?

The pooled EFA of the seven items with the principal-axis factoring (PAF) method yielded a one-factor solution based on Kaiser's criterion (Eigenvalue > 1) and a scree plot (Kahn 2006). In addition, the reliability analysis offered Cronbach's α = .76 in 2003 and .78 in 2013. These results indicate that the seven items are associated with a single underlying dimension across 22 countries, suggesting that it is appropriate to construct a single composite measure of PIT from the seven items. However, the country-specific EFA with the same extraction and retention methods as the pooled EFA offered two different scenarios in 22 countries. One factor was extracted in eleven countries—Denmark, Finland, France, Germany, Ireland, Latvia, Norway, Slovenia, Sweden, the United Kingdom, and the United States—for both 2003 and 2013, whereas two or three factors were extracted for 2003, for 2013, or for both years in the other 11 countries—Czech Republic, Hungary, Japan, the Philippines, Portugal, Russia, Slovakia, South Korea, Spain, Switzerland, and Taiwan.

In this note, I test the comparability of the universal measure separately by these two scenarios. For the countries with a one-factor solution, I compute Tucker's congruence coefficient for factor comparisons (Tucker 1951). Tucker's congruence coefficient provides a measure of the shared variance between two sets of factor loadings (Lorenzo-seva and ten Berge 2006; Nimon and Reio 2011). The formula for the Tucker's congruence coefficient for this study can be represented as follows:

$$r_{u,c} = \frac{\sum \lambda_{u,i}\lambda_{c,i}}{\sqrt{\sum \lambda_{u,i}^2 \sum \lambda_{c,i}^2}}, \quad i = 1,...,7, \quad c = 1,...,11$$

where $\lambda_{u,i}$ is the factor loading of item i in the universal measure of 22 countries u; $\lambda_{c,i}$ is the factor loading of item i in the country-specific measure of country c. The Tucker's congruence coefficient ranges from −1 to 1, and a high value indicates the similarity of factor structure between two models.

For the countries with two- or three- factor solutions, I test the comparability by regressing the universal factor scores on country-specific factor scores. This ordinary least square (OLS) regression analysis for each country allows me to capture how much of the variance of the single universal factor is explained by multiple country-specific factors. Factor scores are calculated by the regression method in SPSS because correlated factors are theoretically more plausible (Distefano, Zhu, and Mîndrilă 2009). The OLS regression model can be represented by the following equation:

$$y_u = \sum_{f=1}^{n} a_{f,c} x_{f,c}, \quad n = 1, 2, \text{ or } 3$$

where y_u is the factor score of the universal measure of 22 countries u; $x_{f,c}$ is the factor score of retained factor f in the country-specific measure of country c; $a_{f,c}$ is the coefficient of the country-specific factor score.

Analysis

Table 1 shows factor loadings of the pooled EFA and the country-specific EFA in the 11 countries that obtain a one-factor solution. Factor loadings refer to the correlation between each item and the underlying factor, and thus the similarity of the factor loadings between the universal model and the country-specific models support the comparability of the universal measure of PIT. For 2003, factor loadings of the seven items for the universal model range from .492 and .735. The eigenvalue is 3.275 with the underlying factor explaining 46.8% of the variance of the observed seven items. The range of the mean of factor loadings in the country-specific models is.448 to .733, which is similar to the universal model. On average the country-specific factors explain 47.7% of the variance in the seven items. The difference in the factor loadings between the universal model and the country-specific models ranges from .002 to .062; that is, the mean of the factor loadings for country-specific models approximate the factor loadings for the universal model. These findings show that the universal measurement model of PIT is similar to the country-specific models in 2003.

Table 1. Measurement Models for Perceived Immigrant Threat in 11 countries from ISSP 2003 and 2013[a]

	Factor loadings					
	Universal model	Country-specific models				Difference
Items	(a)	Mean (b)	SD	Min	Max	|(a) – (b)|
ISSP 2003						
Item 1	.626	.665	.052	.596	.758	.039
Item 2	.665	.662	.113	.371	.734	.003
Item 3	.562	.624	.084	.412	.709	.062
Item 4	.703	.685	.087	.471	.773	.019
Item 5	.508	.504	.071	.392	.597	.004
Item 6	.492	.448	.097	.322	.658	.044
Item 7	.735	.733	.079	.630	.879	.002
Eigenvalue	3.275	3.339				
% of variance	46.8	47.7				
ISSP 2013						
Item 1	.647	.683	.048	.602	.757	.035
Item 2	.695	.682	.067	.565	.785	.013
Item 3	.626	.654	.067	.536	.722	.029
Item 4	.720	.698	.067	.581	.780	.022
Item 5	.488	.474	.075	.365	.610	.014
Item 6	.561	.535	.088	.414	.673	.026
Item 7	.719	.722	.095	.557	.826	.002
Eigenvalue	3.450	3.462				
% of variance	49.3	49.5				

a—This analysis includes the following 11 countries: Denmark, Finland, France, Germany, Ireland, Latvia, Norway, Slovenia, Sweden, the United Kingdom, and the United States

The results of the 2013 PIT measurement model are consistent with those of the 2003 PIT. Factor loadings for the universal model in the range of .488 to .720 are quite similar to those for the country-specific models in the range of .474 to .722. The difference of the factor loadings between the two models ranges from .002 to .035, which is slightly smaller than the range for 2003. Eigenvalues of the universal model and the country-specific models are almost the same (3.450 vs. 3.462). These results suggest that the universal measurement model for 2013 is also acceptable in the county-specific contexts of 11 countries.

Table 2 presents Tucker's congruence coefficients between the universal model and country-specific models in the 11 countries with one factor. All coefficients are above .970, and the average of the coefficients is .994. This result confirms the earlier findings of descriptive comparisons from Table 1. As a result, the universal measures of PIT in 2003 and 2013 are comparable across the 11 countries.

Next, I regressed the universal factor scores on the country-specific factor scores to test the comparability of the universal model across the other 11 countries with two- or three-factor solutions.

Table 3 shows R and R^2 from the OLS regression in each of the 11 countries.

Table 2. Tucker's Congruence Coefficient between Universal and Country-Specific Models, 11 Countries, ISSP 2003 and 2013[a]

Country	2003	2013
Denmark	.991	.994
Finland	.999	.997
France	.997	.999
Germany	.992	.996
Ireland	.997	.994
Latvia	.990	.992
Norway	.999	.996
Slovenia	.973	.994
Sweden	.998	.999
United Kingdom	.993	.988
United States	.992	.996

a—An average of all coefficients of congruence is .994.

Table 3. R and R^2 from OLS Regression for Universal Factor Scores by Country-Specific Factor Scores, 11 Countries, ISSP 2003 and 2013

Country	# of factors	R	R^2
ISSP 2003			
Czech Republic	2	.992	.985
Hungary	2	.995	.990
Japan	2	.996	.992
Philippines	3	.941	.885
Portugal	1	.997	.995
Russia	2	.994	.988
Slovak Republic	2	.977	.955
South Korea	2	.980	.960
Spain	2	.982	.965
Switzerland	1	.990	.981
Taiwan	2	.988	.976
ISSP 2013			
Czech Republic	2	.997	.995
Hungary	2	.989	.978
Japan	2	.990	.979
Philippines	2	.929	.864
Portugal	2	.999	.998
Russia	2	.992	.984
Slovak Republic	2	.995	.990
South Korea	2	.998	.996
Spain	1	.998	.996
Switzerland	2	.998	.996
Taiwan	2	.983	.967

In 2003, the average scores of R and R^2 are .985 and .970 respectively, while the Philippines has the lowest R^2 (.885), and Portugal has the highest R^2 (.995). This result indicates that on average 97% of the variance in the underlying factor of the universal measure is shared with the multiple factors of the country-specific measures. In 2013, the average scores of R and R^2 are .988 and .977 with a minimum of .864 (the Philippines) and a maximum of .998 (Portugal). This is consistent with the result from 2003, suggesting that there is about 97% of overlap of factors between the universal measure and the country-specific measures. Although the country-specific EFA provides the 11 countries with the different factor structure in terms of the number of retained factors, it is notable that these multiple factors share large common variance with the universal measure. Therefore, the results of the OLS regression analysis support the comparability of the universal measure of PIT across the 11 countries with multiple factors.

Conclusion

This research note has examined the comparability of the universal measures of perceived immigrant threat across 22 countries from the 2003 and 2013 ISSP. The comparison between pooled EFA and country-specific EFA through Tucker's congruence coefficient and OLS regression analysis confirmed that the universal measure of PIT has a similar underlying factor to the country-specific measures. This finding can warrant the validity of cross-national comparisons.

Although this note has examined EFA to assess the comparability of PIT, there are various statistical methods to test the comparability of constructs, including multiple-group confirmatory factor analysis, item response theory, and latent class analysis (Davidov et al. 2014; Vandenberg and Lance 2000). Future research should test the robustness of the comparability of PIT using these alternative methods to perform meaningful cross-national comparisons.

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We Coded the Documentation of 1748 Surveys across 10 International Survey Projects: This Is What Data Users and Providers Should Know

by Bashir Tofangsazi and Denys Lavryk

Missing or inadequate information in survey documentation reduces data interpretability and the degree to which researchers can confidently use a survey (e.g. Mohler, Hansen, Pennell, Thomas, Wackerow and Hubbard 2010; Lupia 2017). Thus, in the theory of Survey Data Recycling (SDR), which draws on arguments that the Total Survey Error and Survey Process Quality Management put forth (e.g. Groves 1989; Smith 2011; Lyberg and Weisberg 2016), the quality of the documentation of surveys is part of the assessment of overall survey data quality (Slomczynski and Tomescu-Dubrow 2018; Kolczynska and Shoene 2018).

We are Graduate Research Assistants in the project "Survey Data Recycling: New Analytic Framework, Integrated Database and Tools for Cross-National Social, Behavioral and Economic Research" (hereafter, SDR Project) funded by the National Science Foundation (PTE Federal award 1738502) and have seen up-close and first-hand the importance of proper documentation.

One of the main goals of the SDR project is to create harmonized variables with information pooled from thousands of national surveys stemming from major international projects; to harmonize, it is essential that the source data have accessible and accurate description (e.g. Vardigan, Granda and Hoelter 2016; Slomczynski and Tomescu-Dubrow 2018; Kolczynska and Shoene 2018). This description in the documentation enables harmonization and data quality decisions such as, among others, choosing which source variables can be considered for harmonization and identifying processing errors in the source data (Oleksiyenko, Wysmulek and Vangeli 2018). Despite the obvious importance of proper documentation, extant work shows substantial variability in the quality of documentation, within and across major international survey projects (e.g. Kolczynska and Shoene 2018).

Under the supervision of the SDR Project, we received a checklist of survey data documentation items to code that builds on the schema developed in the Harmonization Project, funded by Poland's National Science Centre (2012/06/M/HS6/00322). In the previous project, our

colleagues coded 1721 surveys stemming from 22 international survey projects spanning 1966 to 2013. Following the broadened scope of the SDR database, in the new SDR Project we added to that and coded documentation of over 1,700 additional national surveys (cf. www.asc.ohio-state.edu/dataharmonization/data/international-survey-projects-in-sdr/). In Appendix A, we list the items identified for survey data documentation coding.

To capture and code the required information, we analyzed descriptive documents about the survey process such as technical reports, methodological reports, fieldwork descriptions, codebooks or even questionnaires. The data producers provided these via projects' websites or through data archives, such as GESIS. The data that we coded are to become methodological variables at the level of country-years (national surveys in a given year) included in a larger array of metadata that will become part of the new SDR database.

Survey documentation is available by country (e.g., World Values Survey and the Comparative Study of Electoral Systems) or by wave (e.g., International Social Survey Programme and the European Social Survey). If we compare the process of coding by survey wave, we find that coding by country is more meticulous in terms of accuracy and completeness of information, but it is also much more time-consuming.

Coding documentation by eye and hand is, of course, boring, but is necessary because of factors as those listed below.

File Format Variety

The documentation came in variety of formats, such as PDF, HTML, DOC, and XLS that would require a series of programs to automate the process. The documentation from the 1990s and back further in time were not designed to be optically scanned, which means that the information cannot be obtained from these documents automatically (we cannot just "copy and paste"). To resolve this problem we use the OneNote program that comes with Windows OS. OneNote converts images (screenshots of PDF page) into text and facilitates the process of data retrieval. In some cases, the layout of the document itself impeded our ability to understand the text. We should also add that the texts derived in this method often had spelling errors. These problems could be so acute that, in some cases, it was necessary for us to read everything from the original file and type it manually in the sheets containing documentation quality information. Not all documents provide substantial information, but it is necessary to look through all of them in order not to miss anything.

Document Location Variety

We found the documentation in a variety of ways, including projects that have purposeful websites (like ESS or WVS), and websites of organizations that led the project (like Vanderbilt University in the case of the Americas Barometer). Data archives also house survey data documentation (GESIS, ICPSR, UK Data Service, and others). Because survey administrators and documentarians can, in

theory, upload, take down, or update survey documents, we needed to settle on a set of documents from a fixed time point. This date we documented in our files as the reference date for the checks we performed on the documentation. Any changes that survey producers or data archives may have introduced after the reference date would not be reflected in our coding. This procedure is mandatory to make the coding project feasible. In some cases, the documentation downloaded from a project's website did not provide accurate and sufficient information. In such cases we had to search for the required information online using different keywords, including the project' name and, in case of national surveys, country and year. This search was successful in some of the cases and we could find the information we were looking for in webpages of major institutions such as the World Bank. In a few instances, some of the required information was available on a project's webpages even though it was not included in the files downloaded from the website; to ensure consistency and for future references, we recorded screenshots of these pages.

Difficult Cases

In consultation with the SDR supervisors, we needed to adjudicate difficult cases that stemmed from poor or inconsistent documentation. For instance, different studies provided the response rate in different ways, e.g. with or without the number of refusals or ineligible respondents. Another major difficulty we encountered was to accurately identify a survey's target population. In many cases, the documentation did not clearly distinguish between "citizens" (as a legal category) and people who reside in a specific country. In other cases, the target population was simply referred to in the documentation as the "population," without any indication if exclusion or inclusion criteria applied (e.g. whether the target population included the institutionalized). According to the documentation, some countries were described as a whole "entity," but in the dataset they were treated as separate administrative units (e.g. Germany-West and Germany- East in World Values Survey, Wave 6).

With documentation quality so inconsistent, we sometimes struggled to even understand whether given international projects and their national surveys met the SDR-selection criteria (cf. asc.ohio-state.edu/dataharmonization/data/international-survey-projects-in-sdr/). To illustrate, at first glance the New Europe Barometer seemed a good candidate for the SDR Project. Its website states that "Because the NEB repeats key questions across time within a country and across countries, this creates a unique comparative data base. Trends within a country since 1991 show the extent of improvement or fluctuations in the costs and benefits of political and economic transformation. Comparisons can be made across new EU member states and Soviet successor states--and with countries that fall between these two categories" (www.cspp.strath.ac.uk/nebo.html). However, close inspection of the NEB nested webpages reveals that NEB is in fact an umbrella term for a series of projects, only some of which are cross-national (The New Democracies Barometer, The New Baltic Barometer, Yugoslav Successor States). To sum up, clearer documentation would have saved us substantial time and effort.

What Would Help

We provide below a few suggestions to survey project managers and data providers that would make the documentation more transparent to users:

1. All documents should be available in PDF and HTML, so that they can be read across different computer operating systems and software. HTML might also enable automation of some of the more boring tasks that should not, in a perfect world, require humans to do.

2. Project websites should provide a clear description of all the survey documentation that they provide, and what languages the documents are available in. Ideally, project webpages would have a stable address such as one finds in GESIS and ICPSR.

3. Considering that international survey projects vary in terms of quality of documentation, a wider adoption of DDI standards might improve the situation, including the production of structured, machine-processable metadata.

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Appendix A. Checklist of Items to Code

The list below of what to look for and code in the documentation was initially developed in the Harmonization Project, and extended for the SDR Project.

Fieldwork dates	Source	Source of fieldwork dates	string
	Source description	Fieldwork dates	date (any format)
Universe (target population)	Available	Information about the universe is available	0/1
	Source	Source of information about the survey universe	string
	Source description	Universe of the study (full description, verbatim)	string
Sampling	Available	Information about sampling scheme is available	0/1
	Source	Source of information about the sampling scheme	string
	Source description	Sampling scheme (full description, verbatim)	string
Translation	Available	Information on translation method is available	0/1
	Source	Source of information on translation method	string
	Source description	Translation method (full description, verbatim)	string
	Value	Information indicates that a professional translation method was employed	0/1
Pretest	Available	Information about whether or not pretesting was performed is available	0/1
	Source	Source of information on pretesting	string
	Source description	Pretesting procedures (verbatim)	string
	Value	Information indicates that pretesting was performed	0/1

Interview mode	Available	Information about interview mode is available	0/1
	Source	Source of information on interview mode	string
	Source description	Interview model (full description, verbatim)	string
Response rate	Available	Value of response rate is available	0/1
	Source	Source of information on response rate	string
	Value	Value of response rate	value (0; 1)
	Flag	Value of response rate in the documentation is approximated	0/1
	Flag	Response rate calculated based on numbers provided in the documentation	0/1
Fieldwork control	Available	Information about whether or not fieldwork control was performed is available	0/1
	Source	Source of information on fieldwork control	string
	Source description	Fieldwork control description (verbatim)	string
	Value	Information indicates that fieldwork control was performed	0/1

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Conferences & Workshops

The 2019 CSDI International Workshop in Warsaw, Poland

In 2019, the annual International Workshop of the Comparative Survey Design and Implementation (CSDI, www.csdiworkshop.org/index.php) will be held March 18th –20th at The Institute of Philosophy and Sociology of the Polish Academy of Sciences, Warsaw, Poland. The Call for Individual Abstracts is currently open. Abstracts are due December 21, 2018 and can be submitted using CSDI's online submission system.

The main goal of CSDI is to improve comparative survey design, implementation and related analysis. Its annual workshops provide a forum and platform of collaboration for scholars involved in research relevant for comparative survey methods.

At the 2019 CSDI Workshop, members of the SDR Project are organizing the session **Harmonizing Panel Survey Data for Multi-Cultural Research.** By repeatedly collecting information from the same individuals, panel surveys are best suited for analyzing the conditions, causes and consequences of change that people experience over time. Yet, because they are costly to field, such data are underrepresented among survey studies; international panels are especially rare. A solution that can facilitate cross-national research using panel data collected in different countries and time periods is the harmonization of these data. For single-country panel studies with well-defined research agendas, researchers can identify theoretically relevant variables and harmonize them *ex-post*. For ongoing panels, researchers can harmonize *ex-ante* selected variables that pertain to specific research topic(s), so that subsequent rounds of each single-country study will contain the needed data for comparative analyses. Researchers can harmonize prior waves of the panel survey *ex-post* and prepare them for *ex-ante* harmonization. However, as one needs to consider both between- and within-panel harmonization, this strategy poses significant yet surmountable methodological challenges. This session invites theoretical and empirical contributions to methods that are designed to evaluate and improve the comparability of extant panel survey datasets, as well as strategies for harmonization and the analysis of data from different panel studies.

Two SDR-related Harmonization Sessions at ESRA 2019 in Zagreb, Croatia

Ilona Wysmulek, Irina Tomescu-Dubrow and Kazimierz M. Slomczynsi of the SDR Project are organizing two sessions at the 2019 Conference of the European Sociological Research Association, to be held July 15th -19th, Zagreb, Croatia.

One session is **Survey Data Harmonization: Potentials and Challenges.** Survey data harmonization - its theory and methodology - is growing into a new scientific field that pushes forward

the methods of survey data analysis while emphasizing the continuous relevance of surveys for understanding society. Depending on whether researchers intend to design a study to collect comparable data, or use existing data not designed *a priori* as comparative, the literature distinguishes between input and *ex-ante* output harmonization, and *ex-post* output, or, just *ex-post*, harmonization. Applied *ex-ante*, harmonization facilitates comparability of survey data collected in multinational, multiregional and multicultural contexts (3MC, www.csdiworkshop.org). Applied *ex-post*, harmonization enhances the effective use of extant surveys and represents a way to overcome limited time and space coverage inherent in any single comparative project. In both its forms, *ex-ante* and *ex-post*, harmonization is a complex, labor-intensive and multistage process, which poses numerous challenges at different stages of the survey lifecycle. This session welcomes papers on both opportunities and difficulties inherent in *ex-ante* and *ex-post* survey data harmonization.

The other session is titled **Messiness in Extant Cross-national Survey Data: New Approaches to Old News** and focuses on survey quality**.** Cross-national survey projects exhibit wide variation in data quality, both within and across projects. Some departures from quality standards that the specialized literature has established for data collection, cleaning, and documentation, such as the presence of non-unique records (or duplicates), are unequivocal instances of 'bad data,' while others, such as certain types of processing errors are more ambiguous. Between the clearly bad and clearly good survey data there may be a range of 'decent' quality surveys, with potentially interesting and important information collected form under-surveyed countries and less well covered time periods. However, to date there is little research that systematically assesses the quality of extant international survey data, or that looks at whether and how the 'messiness' in existing surveys can be minimized ex-post, and with what consequences for empirical analyses. For this session we invite theoretical and empirical papers on evaluating the quality of extant surveys, after the stages of data gathering and documentation are completed. This could include creating new metadata for survey quality.

News

A New Model for Partnering

By The Ohio State University's Translational Data Analytics Institute (TDAI)

Ohio State's Translational Data Analytics Institute (TDAI) is forging new ways of interacting with industry partners to address societal issues through data analytics. One challenge it's tackling from multiple angles: the growing need for data scientists and analytics skills across myriad sectors and for diversity in the field.

After thoroughly inventorying Ohio State's academic offerings related to data science and analytics, TDAI identified the need for master's degree-level programming in translational data analytics—beginning with one that helps upskill the current workforce. As a solution, TDAI is using

private sector input to create a Professional Science Master's degree in translational data analytics designed specifically for mid-career professionals.

Concerted discussions with corporate partners have also indicated a broad need for communication and storytelling skills in new hires coming straight out of college, and — across the board — a concern about increasing diversity and inclusion in data science and analytics as a field.

In response, TDAI co-developed a visualization track for the university's undergraduate data analytics degree and seeks to enlist corporate partners in creating projects for students that offer relevant hands-on experience.

And to foster talent and diversity even further upstream, TDAI launched a Data Science for Women summer camp that teaches high school girls about data science and analytics and the breadth of opportunities that accompany such skills. Nearly all of the 28 women that attended came from underrepresented populations and/or attended Columbus City Schools.

As indicated by its name, the Translational Data Analytics Institute aims to create solutions to challenges that are informed by stakeholder input to ensure their relevance and usability. As that mindset gains traction in the research realm, TDAI is finding ways to incorporate it in academic programming that will yield a better-educated citizenry with 21st century knowledge and skills.

Harmonization would like to hear from you!

We created this Newsletter to share news and help build a growing community of those who are interested in harmonizing social survey data. We invite you to contribute to this Newsletter. Here's how:

1. Send us content!

Send us your announcements (100 words max.), conference and workshop summaries (500 words max.), and new publications (250 words max.) that center on survey data harmonization in the social sciences; Send us your short research notes and articles (500-1000 words) on survey data harmonization in the social sciences. We are especially interested in advancing the methodology of survey data harmonization. Send it to: Joshua K. Dubrow, dubrow.2@osu.edu.

2. Tell your colleagues!

To help build a community, this *Newsletter* is open access. We encourage you to share it in an email, blog or social media.

Support

This newsletter is a production of Cross-national Studies: Interdisciplinary Research and Training program, of The Ohio State University (OSU) and the Polish Academy of Sciences (PAN). The catalyst for the newsletter was a cross-national survey data harmonization project financed by the

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