THE EDINBURGH PARTNERSHIP

Edinburgh Partnership Survey Methodology

1. Executive Summary

1.1 The report sets out the options for the methodology of the partnership survey.

1.2 The report only covers those survey methods which could be repeated at any interval and would be reasonably robust to changes in the number of interviews performed. However, significant changes to the number of interviews would change reliability and limit reporting options, therefore it is better to perform fewer surveys with more participants each wave, than more waves with fewer participants each wave.

2. Recommendations

2.1 The Board is recommended to:

1. Note the preferred methodology for the Edinburgh Partnership survey will be based on a face-to-face, in-street approach.

2. Note the risks identified within the report if overall funding for the survey were reduced.

3. Agree that any future waves of the survey seek to match closely against the survey method, sampling method, and the number of interviews achieved in the first survey, in order to maximise comparability and therefore a change of frequency in survey waves would be explored as a way to reduce costs if needed.

3. Main Report

3.1 This report sets out the options for the methodology of the Edinburgh Partnership Survey.

Background

3.2 Following the meeting of the working group on the Edinburgh Partnership Survey in September 2022, options for the methodology were discussed with the preferred approach being a on street face to face approach. A decision on this is required before a survey fieldwork partner can be procured.

3.3 The chosen methodology will strongly influence all aspects of the survey. But it is important to recognise that there is no survey methodology which is without limitations and drawbacks. As such, the selection of methodology should be overall strong on those areas that are material to the quality, subject and purpose of the survey, while consciously compromising on less important aspects.

3.4 The working group wanted to highlight risks and issues in relation to future waves of the survey and to minimise any risk that might come from partners funding the survey infrequently or at a substantially different scale.

Survey requirements

3.5 This discussion on methodology does not address all the benefits and limitations of survey methods, but only concerns itself specifically with how to effectively survey a population of interest with the following requirements:

3.5.1 All participants must be resident in the City of Edinburgh local authority (Edinburgh) at the time of participation.

3.5.2 The sample achieved by the survey should be proportionately similar to the population of Edinburgh in terms of: age and sex (interlinked); and ethnicity.

3.5.3 The results of the survey should be reportable: in total; at locality-level geography; and by multiple deprivation quintile.

3.5.4 The annual survey must be undertaken within a budget of £60,000.

3.5.5 The survey method must be replicable so future waves, if any, can be undertaken consistently.

Discussion of methods

3.6 This paper sets out the main methods which could be used to undertake a survey with the above requirements. As face-to-face in-home surveys are typically the most expensive survey method and would not be affordable within budget, this method has not been considered.

Telephone survey

3.7 A telephone survey would be undertaken entirely during telephone calls. These would be conducted by fieldworkers who would call numbers from a sample which has been prepared for them, composed of both landline numbers and mobile numbers.

3.8 Complications and limitations:

- Telephone samples must be bought, adding cost to the method. Any biases in the telephone sample collection method are also unavoidably passed on to our survey.
- Surveys should be designed for telephone calls and avoid response text which is extensive, and which must be read out multiple times during the interview.
- It would most likely not be possible to ensure a sub-city-level geographical spread of responses by telephone, the achieved sample would be random and might vary significantly from quarter-to-quarter.

- Telephone surveys may take longer and cost more per response than any of the other options available, which would significantly reduce the number of interviews that could be undertaken.
- Telephone surveys are often confused with marketing calls, and can make some participants, particularly older people, reluctant to provide personal information. There is some evidence to suggest willingness to participate in telephone surveys is decreasing generally.

3.9 Clarity of question and response is usually high with telephone surveys. Telephone surveys are not impacted by inclement weather.

Face-to-face in-street survey

3.10 Individuals would be interviewed in-street (and in-home in certain areas of the city) based on a quota of age and sex (interlocked) that is proportionate to Edinburgh's population. Other characteristics, including deprivation, would be expected to fall out naturally from this selection process, but results could still be weighted if necessary.

3.11 Complications and limitations:

- Experience with this method for the Edinburgh People Survey has shown that participants will be geographically clustered around sampling points, which means they are more likely to be individuals who live near busy pedestrian roads, shopping areas, and local transport hubs. Though the effect of this on results can be limited through sampling point selection.
- It is slightly more difficult to interview higher income individuals and easier to interview lower income individuals through in-street surveys because of their transport choices. This can materially impact the sample achieved.

3.12 Clarity of question and response is usually high with face-to-face surveys. It is usually easier to obtain a sample through face-to-face interviewing than other methods.

Postal survey

3.13 Selected households would be sent a questionnaire and a reply-paid envelope. The number of households in each area would be selected based on the proportion expected to be returned. It would generally be expected that households in more deprived areas would be less likely to respond, so more households in that area would be offered an opportunity to participate. The final achieved sample would be weighted according to the age and sex (interlinked) of the population of Edinburgh, and the deprivation of participant household areas.

3.14 Complications and limitations:

- Literacy and fluency impact who can respond to a postal survey. It is very difficult to include the views of people with lower written English skills as a group.

- Response rates are typically low, and participation would usually be incentivised. A portion of the budget would need to be set aside for incentives. However, incentives have differing appeal across demographics, and care would need to be taken to ensure any incentive was broadly effective as well as specifically effective with under-incentivised groups.
- Letters to households are likely to be responded to by the main householder. In multi-generational homes this means that older people and younger adults are less likely to respond. This kind of systematic exclusion cannot necessarily be accounted for by weighting data.

3.15 Postal surveys are not impacted by inclement weather. Individuals can be asked slightly more difficult or sensitive questions as they have more time to respond and are not responding to an interviewer – e.g., weekly household income, sexuality.

Future waves of the survey

3.16 This survey is consciously designed with the intention of being a tracking survey – that is to say, a survey which will be repeated and results from different waves of the survey will be compared to determine what changes have occurred.

3.17 All of the methodologies outlined previously are suitable for a tracking survey, and while each has idiosyncrasies that will influence the overall results, all can be expected to report the degree of change over time reliably.

3.18 However, all of the survey methods suffer from vulnerabilities due to change of scale – which is to say, significantly changing the number of people who participate in each wave. The number of participants determines how reliable a survey is overall, and strongly influences at what geographic level and for which demographic groups its results can be report, and whether those results be considered valid.

3.19 Because of the survey's objectives, it will be designed to report valid results at locality level. While an overall reduction in the scale of the survey (e.g. 25%) might not impact the overall reliability of the survey, it would have a significant impact on the reliability of data at locality level, and for particular demographics. If the scale of the survey were to change over time, it might be impossible to track change in satisfaction for younger people, people with a disability, or people from non-white ethnic backgrounds – all of which are minority groups and can be more difficult to survey proportionately.

3.20 Overall survey budgets are also subject to economies of scale. The more interviews are conducted, surveys are completed, etc. then the smaller the unit cost of each survey or interview. Therefore a 25% reduction in funding results in a larger than 25% reduction in fieldwork achieved.

3.21 By contrast, there is no technical problem with delaying a survey wave by one or two years. Results do not become less reliable overall because of a gap in waves, though such gaps mean there would be no ability to capture the impacts of particular events – for example, the war in Ukraine, the current inflation spike and heating costs, and the main impacts of the pandemic would likely have had effects in Edinburgh that would have been realised in less than a year, and could be missed through a gap in surveying.

3.22 While the best solution in terms of quality and reliability of data, and inclusion, is to have a wave of the survey each year, if this cannot be funded, then clear preference must be given for identical waves of the survey to be performed at longer intervals (i.e., every two or three years instead of annually).

4. Contact

David Porteous, Strategy Manager (Insight), The City of Edinburgh Council – david.porteous@edinburgh.gov.uk