

Memo: M4 Pre-test results: Brasil 2010

(draft)

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The Brazilian 2010 Election Study (BES) was conducted in 2010, November 4th to 20th. It is based on a three stage stratified probability sample of 2000 Brazilian adults.

The BES study tested 4 CSES items:

- Q1 (a-f) series on Government spending,
- Q2 - Prospective economic evaluation,
- Q3 - Retrospective evaluation of economy, and
- Q27 - Perception of 'income or job' insecurity.

Translation of the items into Portuguese, done by Rachel Meneguello, introduced certain differences between the wording of the translated items and the CSES originals. The translation-related differences and deviations are mostly minor. Thus for instance, in Q1 series on government spending, question *d* states "*on defense*", while in the BES it is on "*Armed Forces (army, navy, and airforce)*".

In several instances, the *answer options* are formulated differently. For instance, in Q2 on prospective economic evaluation, CSES answers express the degree of agreement (e.g., "*1. strongly agree*"), while in the BES the corresponding answers evaluate the degree of change ("*1. much better than now*"). The same BES item also includes the neutral answer option ("*3. the same*"), while there is none in the Q2. In some cases (Q3) BES did not include the follow-up items (to what extent the situation got better/worse), thus making the evaluation of the question incomplete. Finally, Q27 was formulated with more significant deviation from the CSES standard. The major differences are in the time frame the question specifies (a year vs. 6 months in the BES), and the answer options (4 gradations of probability vs. yes/no categories in BES). The question still seems to cover the same concept (perception of income/job insecurity), but any comparative analysis would require adjustment of the BES codes and care in interpretation.

Most of the observed deviations are due to the specificities of the local setting (language, specific expressions used in political discourse, specific political context), and to the need to conform to the established procedures of the Brazilian election studies (i.e., to maintain across-time comparability).

The overall conclusion on the translation issues is that the items can generally be regarded as functionally equivalent, and their analysis could be used to evaluate the CSES items in this context. The analysis of the item distribution generally revealed an expected variability of the answers. Yet, in some cases, there is a notable tendency of the respondents to give specific answers. For instance, 81% answered "*3. Gasta Pouco*" to the question about gov't spending on health. Similar bias (though to a smaller degree) is observed in the remaining Q1 items. This seems mostly to represent the actual opinions of the Brazilian public, though it probably reflects a degree of response-set bias as well.

The pattern of the non-valid responses (DNK, Refused) also seems to reflect the public opinion, rather than the problems with the instrument. For instance, in the Q1 series, large proportion of DKN answers is observed for the items concerning defense and industry (around 18%; in the case of health it is less than 3%). It does not seem unusual that the public is less certain about spending on such areas.

Distribution of the items on prospective and retrospective economic evaluations (Q2 and Q3) shows a strong tendency/bias towards the positive evaluations. Brazilians seem particularly optimistic about

their economic future: only about 2% of the respondents believe that the future will be a little or much worse than the present. This, again, seems to reflect the public opinion, as it has been reported in other surveys conducted at the time, rather than a bias inherent into the items. Yet, a degree of the method influence cannot be ruled out. The formulation of the Q2 and Q3, both in the original and BES, seem suggestive and 'pushing' respondents to provide positive answers, as in the case of negative views it would seem as if they contradict the interviewer. Finally, a tendency to provide positive answers might be a broader cultural feature rather than only the opinion at the moment of the BES study.

Economic optimism is also noticeable in the distribution of the item Q27. Nearly 82% of the respondents (only respondents in the workforce are asked this item) say they are not worried about losing their job in the next 6 months. Such a biased distribution might partly be caused by the shortened time-frame suggested by the Brazilian study (6 months instead of 1 year). But, the other sources of bias mentioned above are applicable here as well.

A further step in the analysis was to examine the correlations among the tested CSES items and with a few usual demographic variables. Items of the Q1 series showed significant, positive, and high intercorrelations (from $r=.24$ between defense and pensions, up to $r=.68$ between health and education). Positive associations are expected, but this seems also to reflect a method effect caused by the specific question format.

This interpretation is supported also by the associations with the demographics. First, the associations with education, age and income are much lower than the Q1 intercorrelations (different format and different location in the questionnaire). Second, all the Q1 items tend to have very similar associations with the demographics (and with the remaining CSES items). This shows a certain lack of differentiation concerning the different areas of government spending.

Finally, the tested items were correlated with the question on satisfaction with Brazilian democracy. Most of the coefficients are low but significant. The highest is with the item on gov't spending on education ($r=.15$), suggesting that the dissatisfied with democracy think that gov't is spending too little on education (and other areas as well).

The already noted tendency towards weak associations of the CSES variables should perhaps be more emphasized. For instance, the perceived job/income insecurity is not related to any of the Q1 items (one would expect that the fearful would think that the gov't should spend more in the relevant areas - e.g., industry or the unemployed). Likewise, the same item is unrelated with the prospective or retrospective economic evaluations. Retrospective economic evaluation is not related to any of the demographics, and so on. This feature might be partly of methodological origin, but not necessarily specific just for the CSES items. The BES questionnaire is extensive, and the respondents might have switched to the satisficing mode of answering, for instance, due to the length of the BES interview (in fact, the CSES Q1, Q2, & Q3 items were in the last 25% of the questionnaire, while Q27 was in the beginning), or to certain cultural features.

It should, however, be also mentioned that the observed associations are generally in the expected direction (despite being often very low and insignificant). For instance, the better educated are more likely to think that gov't spends too little on health and education (coefficients are $r=.12$ and $r=.17$ respectively). Likewise, the better educated are more optimistic about their economic future, while the older are more pessimistic.

Summary:

- The translation has some problems, but mostly maintains functional equivalence
- The examination of the data (distribution, basic associations) has not revealed problems that would obviously invalidate the items. The observed biases might reflect both the specific cultural characteristics and method effects;

- There is an apparent lack of differentiation among the Q1 items (government spending), which might, at least partly, be due to the question format;
 - The items could perhaps be improved by emphasizing, in the introductory text to the question series, that 'different people have different preferences about government spending; some want more in one area others more in another...'. Such an instruction might result in respondents' exhibiting more differentiated preference;
- Q2 and Q3 appeared as if 'pushing' r's towards positive answers. A brief line at the question beginning might help relativizing the choice:

CSES original

Q2. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statement:

'Over the next ten years or so, my family and I have a good chance of improving our standard of living.'

Suggestion for Q2 & Q3 intro

People have different expectations about the future; we'd like to ask about what you think is most likely to happen...

(or something like this)

- There is generally a tendency towards low associations both among the different CSES items and with the demographics. Again, this might reflect the method bias, but also cultural features, as a similar tendency has been encountered in other surveys using differently formulated items;
- The message is that the items passed the test, but seems worth thinking about their improvement.