



World Values Survey Association

Rules and Procedures in Wave 8 (2024-2026)

Guidance for Principal Investigators

Table of Contents

1. INTRODUCTION AND GENERAL PROVISIONS	2
2. TIMELINE OF WVS WAVE 8 (2024-2026)	3
3. THE COMMON QUESTIONNAIRE	4
4. DEVIATIONS FROM THE ORIGINAL QUESTIONNAIRE	5
5. QUESTIONNAIRE TRANSLATION	6
6. SAMPLE COVERAGE	8
7. SAMPLE TYPE AND METHOD OF SAMPLING	9
8. SAMPLE SIZE	12
10. SURVEY METHOD	13
11. ETHICAL ISSUES AND INFORMED CONSENT	14
12. INTERVIEW PROCESS: MISSION OF THE INTERVIEWER, RULES FOR INTERVIEWERS	17
13. QUALITY CONTROL PROCEDURES	23
14. SUBMISSION OF DATA AND THE FINAL REPORT	24
15. ACCEPTANCE AND SHARING OF DATA SETS	24
15. CHECK LIST OF DELIVERABLES TO BE SUBMITTED BY YOUR TEAM	25



1. INTRODUCTION AND GENERAL PROVISIONS

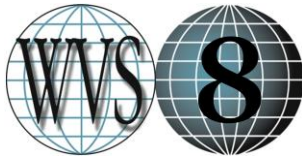
Welcome in the World Values Survey wave 8!

The goal of the WVSA is to contribute to a better understanding of global changes in values, norms and beliefs of people. To achieve this goal, the members of the WVSA carry out representative national surveys worldwide. In its cumulated form the joint data set is known as the World Values Survey.

The WVSA is a non-profit research organization with a commitment to academic standards. Specifically, the WVSA commits itself to the WAPOR Code of Ethics (World Association for Public Opinion Research), ESOMAR Code of Ethics, Interviewer Quality Control Scheme (IQCS), and the WVS Code of Ethics. Among the other, WVSA recognizes its responsibility to contribute to the science of public opinion research and to disseminate as freely as possible the ideas and findings which emerge from our research.

In relation to its WVS surveys, the key aim of the WVS Association is to implement **high quality standards in its methodology** and to improve standards in the field of cross-national surveys more generally. Measuring values, norms, beliefs, and attitudes in cross-national perspective has challenges that go beyond those in national surveys conducted only in one country. For this reason, to generate the highest quality scientific data, Principal Investigators of the World Values Survey are required to observe the common principles and to follow the established rules. In addition to the current guidance, WVS surveys should be conducted in accordance with the WAPOR and ESOMAR public opinion survey principles and the code of ethics, including but not limited to:

- All WVS teams must **exercise special care** when the nature of the research is sensitive or the circumstances under which the data was collected might cause a data subject to become upset or disturbed.
- WVS survey must never be used as a disguise for other purposes such as **marketing, sales solicitation, fundraising or political campaigning**.
- No information gained through a research activity shall be used, directly or indirectly, for the personal **gain or advantage** of the interviewer in his/her relations with the respondents.
- All those approached as potential survey participants (respondent) must receive an **explanation of the nature of the survey**, the provisions to maintain confidentiality, and the uses to which the data will be put.
- WVSA national team and local interviewers' networks are obliged to guarantee **anonymity and privacy** of the interview process.
- Researchers must conform to all applicable **international and national laws**, and local codes of conduct and professional standards or rules.
- As a rule, interviews should be conducted in the native (first) language of the respondent (or in a language he/she is comfortable with).



WVS is a collaboration research program; for the success of every WVS wave, understanding and cooperation between the WVSA leading bodies, WVSA Secretariat, and WVSA national teams becomes essential. In WVS8, the WVSA Secretariat, Executive Committee and Scientific Advisory Committee will:

- Provide all national teams with all relevant documents required in order to implement WVS8.
- Provide timely and comprehensive responses to all enquiries of national teams before, during and after fieldwork implementation.
- Maintain regular communication with representatives of all national teams.
- If necessary, provide expert support with preparation of funding applications, survey design and interviewers training.

Every national team is expected to:

- Follow the instructions of the WVSA Secretariat.
- Stay in touch with the WVSA Secretariat during and after the survey fieldwork.
- Deliver the outputs (national data-set) in time and in good quality.
- Submit timely technical report and supporting documentation.
- Report immediately on problems, considerable deviations.

In case of any questions arising, please, send your inquiries to the WVS Secretariat (wvsa.secretariat@gmail.com). Depending on the nature of your enquiry, it will be re-directed by the Secretariat to the Executive Committee, Scientific Advisory Committee, or the Data Archive. The response of the corresponding WVSA body will be communicated back to the main contact of your national team.

We wish you the best of luck with implementation of the WVS-8 in your country and thank you for your continuing support to the WVS Association!

2. TIMELINE OF WVS WAVE 8 (2024-2026)

WVS wave 8 commenced in January 2024 and will last till December 2026. Depending on the WVS team's experience, available resources and other factors, preparation to the survey can require different amount of time, and thus the WVSA encourages all WVS national teams to start planning their national surveys as soon as possible. An extension at the end of the wave might be granted by the WVSA but should not be taken for granted already at the beginning of the wave.

National surveys can be conducted at any time during this time interval (Jan 2024 to Dec 2026), depending on the funding schedule and other country-specific factors. When planning the timing of the survey(s), factors to consider include ***seasonal constraints and cultural factors*** (e.g. rainy seasons, summer or new year holidays, religious holidays i.e. Ramadan, harvesting periods etc.). Teams should avoid conducting survey in such and other times which reduce respondents' availability and thus contribute to the sampling bias and higher non-response rate. Likewise, WVS surveys should not be conducted immediately before or after national elections. In case any extraordinary events occurred during the WVS survey in the



country, this should be ***documented in the survey technical report*** (in relation to this, it also becomes particularly important to document the date of every interview).

Unless the country's territory is very big or planned sample size exceeds 3000 respondents, it is expected that the data collection shall be completed within ***4 weeks'*** time from the date of start of the first interview.

After data collection is completed, ***between 4 and 12 weeks of time are given to the WVS national teams to perform data entry and data cleaning***, to substitute the interviews of poor quality and to submit the dataset to the WVSA Secretariat. If a longer period of time is required by the national team to prepare the data for submission to the WVSA, this needs to be explicitly communicated (and justified).

In wave 8, the WVSA [continues our cooperation](#) with the European Values Study. Principal Investigators (PIs) in European countries are encouraged to plan their WVS surveys in cooperation with the EVS PIs (or otherwise to ensure that the two surveys will be organized in a non-conflicting mode in terms of time and funding).

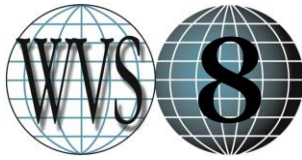
3. THE COMMON QUESTIONNAIRE

The common questionnaire has been drafted by the Questionnaire Committee, in consultation with the Executive Committee, the Scientific Advisory Committee, Principal Investigators, and experts in the field.

WVS questionnaire for wave 8 consists of 250 questions (variables). Although each wave has its own questionnaire, retaining previously asked questions is a major concern, to facilitate overtime analysis. Same questions surveyed across the past WVS waves constitute the "***core questionnaire***" which measures social tolerance to foreigners, religious and ethnic minorities, attitudes towards gender equality and family roles, the role of religion and religiosity, the impact of globalization, attitudes toward the environment, democratic governance, work, family, politics, national identity, culture, diversity, insecurity, and subjective well-being. In addition, the WVS-8 questionnaire has been elaborated with the inclusion of such ***new topics*** like international security perceptions, political trust, perceptions of democracies and autocracies, gender norms and family planning.

WVS requires application of the ***common questionnaire fully and faithfully***, in all countries included into one wave. This is the main condition which ensures over-time comparison of the collected data and is the main criteria for inclusion of each national dataset into the WVS-8 aggregated data-file. Full application of the WVS-8 questionnaire is the main pre-condition for the survey to be included into the World Values Survey wave 8.

The final version of the WVS-8 can be requested by all WVS national teams from the Head of the WVSA Secretariat. WVSA warns all WVS teams against using the questionnaires as shared by other WVS teams or other persons: in case the version that has been used contains any alterations from the official WVS-8 questionnaire, the national data set might not be accepted as a part of the WVS wave 8.



4. DEVIATIONS FROM THE ORIGINAL QUESTIONNAIRE

Excluding questions from the WVS8 questionnaire.

In principle, every question in the original English questionnaire sent by the Secretariat must be asked in every survey. In exceptional cases, where a PI feels that a question is irrelevant or inappropriate for her/his country, she/he may ask the Secretariat for a permission not to ask that particular question.

The PI willing to omit a question should inform the WVSA about that ahead of time and explain the reasons for the omission. ***No question may be omitted without WVSA's written approval.*** Such written approval can be granted by the WVSA's Executive Committee and must be obtained prior to the start of the data collection. The WVSA can only approve omission of a maximum of 12 items (variables).

The PI willing to omit a question should inform the EC about that ahead of time and explain the reasons for the omission. Questions that can be removed include items ***irrelevant to the country's national context*** (i.e. no political parties exist in the country or no elections or trade unions). Further eligible items for exclusion are questions about ***highly sensitive political or cultural issues*** which might cause negative reaction or aggression from the respondent, threaten safety of the interviewer or prevent the national team to obtain state approval for the survey start (where applicable).

WVSA retains the right to reject the data-set due to non-compliance with this rule and unilateral removal of any number of items from the core questionnaire without the prior approval of the WVSA.

Adding questions into the WVS8 questionnaire.

Every WVS team may insert ***additional items*** into the questionnaire in order to study a locally-relevant topic. Additional items may be subject of interest to the WVS national team of the organization/ agency who supports the survey financially.

It is important to realize that those items may affect the quality of the data; due to this, such items thus should be placed ***into the end of the WVS questionnaire*** before the demography section. An exception to this rule is granted if the additional question(s) is (are) directly related to a set of questions or battery in the master questionnaire (e.g. additional group(s) for the "neighbours' battery" or additional institution(s) for the "confidence in institutions battery.").

When inserting new, or country-specific items, it is necessary to take into account that lengthy questionnaire comprises a burden for the respondents and might generate context effects. The WVSA does not recommend adding more than 50 extra questions (variables).

Questionnaire localization

The following country-specific questions require to be adapted to the national context of every surveyed country:

- Q50: confidence to the [church]



- Q69: confidence to the government [if national name available]
- Q71: confidence to the parliament [if national name available]
- Q78B: confidence to political leader [name of the Head of State of your country]
- Q79: confidence to the [main regional organization]
- Q179: country-specific list of political parties
- Q224: *feeling close to your [village, town, city] - orally by the interviewer*
- Q225: feeling close to [country]
- Q226: feeling close to [continent]
- Q235: list of 5 most widespread in the country languages
- Q239-Q241: country-specific list of education levels using ISCED-2011 mapping for your country;
- Q250: list of main ethnic groups living in your country.
- [Your country]/ [country] widely used in the questionnaire; can be replaced with the name of the country where the survey is taking place.

5. QUESTIONNAIRE TRANSLATION

The WVS-8 master questionnaire is designed in **English** and then translated by each national team. To ensure comparability, for questions repeated from the previous wave, ***same translation as in the previous waves needs to be used***. Only the newly included topics and questions will need to be translated. For countries who did not participated in previous waves of the World Survey, the full WVS-8 questionnaire needs to be translated.

Translations into same language done in other countries can be requested from the WVSA Secretariat and will be shared upon availability (this is relevant for languages spoken in more than one country, i.e. Spanish, Arabic etc.). It is up to the WVS national team in every country to decide if they would like to use the already existing translation from the neighbouring country or if they prefer to perform the translation themselves. Translation acquired from other countries ***are to be checked*** for language/ dialect applicability and some amendments might be required.

If country's population is split between using 2 or more languages, the ***interviewer should be equipped with all relevant questionnaire translations prepared by the translation team and approved by the WVSA*** (i.e. oral free-style self-translation of the questions by the interviewer "on the go" during the interview is not acceptable).

Provisions for the WVS-8 questionnaire translation.

In any given country, the questionnaire must be translated into all languages which serve as the first language for ***15 % (or more) of the population***.

Countries sharing languages should prepare first their own draft translations, and then can consult each other about the appropriate translation and harmonization of the question wording if necessary.



WVSA strongly recommends involving *at least 3 professionals for the questionnaire translation*: translator (1); reviewer (2); and adjudicator (3). The task of the reviewer is to check the translation and to propose amendments and corrections. The task of the adjudicator is to decide which version – the original or the amended one – is more correct in reflecting the original meaning of the question. Following this suggestion, the questionnaire translation in wave 8 by each national team should be implemented in several steps:

- a) translation by the translator;
- b) review of the translation by the reviewer and proposition of changes and corrections in the translation;
- c) review of the document by the adjudicator;
- d) discussion of the translation, proposed changes and suggested by the adjudicator solutions by the translator, reviewer, adjudicator, and the member of the national survey team in a country;
- e) finalization of the questionnaire translation;
- f) submission of the final translation to the WVS Secretariat for the approval.

National teams that have participated in previous waves of World Values Survey should note that changes in translations of items in the core questionnaire must not be implemented without approval of the WVSA. When a question was asked in previous waves of the World Values Survey, the *same translation* should be used in the wave 7 in order to allow over-time comparison. In case there are any obvious and serious errors in the existing translation, it should be corrected and the WVSA should be informed about these changes.

All questionnaire translations which are to be used in the WVS8 survey fieldwork in a country must be sent to the WVSA Secretariat for validation. *Validation of the translation* will be performed by the WVSA Data archive; their response will be communicated back to the team within 1-2 weeks after the receipt of the translation.

All translated questionnaires must be *pretested*. The key aims of the pretest are to check if the newly translated questionnaire, all questions and answer options, are clear and understandable to the respondents, complete and correct. A quota sample of at least 20 people representing different social and demographic groups should be used in such a pretest. A brief report summarizing the pre-test results and required (if any) changes or further adjustments of the questionnaire should be sent to the WVSA Secretariat before the start of fieldwork.

If the question has been translated accurately, but its meaning is unclear to the respondents in the pre-test, the team should notify WVSA Secretariat and seek a solution jointly.

What NOT to do in the translation.

All WVS teams are kindly reminded that the translation needs to be *exact, correct and accurate* and clearly reflect the question and the answer options as stated in the English master questionnaire. When preparing their questionnaire translation(s), the national team should **NOT**:

- In any way *modify the meaning of the original questions*.



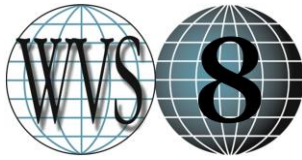
- In any way *modify the meaning of the original answer options*.
- Add additional words and phrases *explaining the question* or the proposed answer options.
- *Change the order of the questions* or the order of the proposed answer options.
- Change the original coding of questions and coding of answer options.

If a cultural adaptation rather than just a translation becomes necessary, the WVSA Secretariat has to be notified about it and it has to be indicated in the documentation.

6. SAMPLE COVERAGE

WVS surveys are required to survey a *national-wide representative sample* of the adult population residing in the country. The sample must correspond to the following criteria:

- Sample should cover at least 95% of the country's population.
- No country region should be deliberately excluded from the survey unless it is a remote location inhabited by 1-3% of the population. Alternatively, regions under military conflict where safety of interviewers and respondents cannot be guaranteed, can be excluded from the sample, following the recommendation of the local team.
- Unless otherwise defined by the national legislature or by the existing established survey traditions, WVS samples should cover adult population in the age 18+. In exceptional cases (voting rights granted earlier; large share of young population) population in the age 16+ can be interviewed.
- No upper age limit for the respondent should be introduced in any country.
- Unless the share of migrants exceeds 50%, WVS sample should cover residents and not only citizens. Category of "residents" does not include tourists or temporary visitors. In exceptional cases, countries with a large share of migrant population (i.e. UAE) can survey only nationals (whose share otherwise will be way too small for analysis, if surveyed proportionally to their share in the overall population).
- Migrant workers can be surveyed in case they have spent at least 24 months in the country prior to the survey date.
- The exact approach must be further developed by every WVS national team. The ultimate goal is to cover all those population groups who comprise the structure of the country's society at present (i.e. the sample must be representative in such a way that it reflects the main distributions observed in the country's population by gender; age; urban/rural; education; income etc. groups). For this, the latest census or official statistical data (if census outdated) should be used to produce the sample calculations.



Which groups can be excluded from the WVS survey?

- With the exception of countries where adulthood commences at the age of 16, WVS surveys do not cover *children or adolescents*.
- Due to the special requirements in survey ethics, WVS survey is not entitled to cover *vulnerable population groups* (victims of violence, refugees, people with mental disabilities; people who are facing homelessness etc.).
- WVS survey methodology requires application of the household-based sample. WVS survey therefore includes *only non-institutional population* and does not cover persons living in military installations, correctional and penal institutions, dormitories of schools and universities, religious institutions, hospitals etc.
- Residents of *very low-populated remote locations* can be excluded from the survey due to budget reasons.
- Residents of *conflict and military zones, zones affected by natural disasters* where conducting the survey can endanger the health and safety of both the respondent and the interviewer can be excluded from the study.

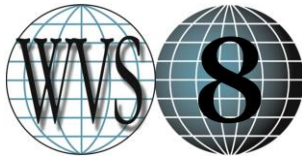
7. SAMPLE TYPE AND METHOD OF SAMPLING

Sampling methods generally fall into one of the two categories:

- **Probability samples.** With probability sampling methods, each population element has a known (non-zero) chance of being chosen for the sample. Probability sampling uses random sampling techniques to create a sample.
- **Non-probability samples.** With non-probability sampling methods, we do not know the probability that each population element will be chosen, and/or we cannot be sure that each population element has a non-zero chance of being chosen. Non-probability sampling methods use non-random processes such as researcher judgement or convenience sampling. Examples of non-probability samples include **voluntary sample** (people who volunteered to participate themselves); **convenience sample** (people who are easy to reach); **quota sample** (persons who fit pre-defined demographic criteria: age, gender, education etc.). **Please, be aware that the WVSA does not accept non-probability samples.**

The sample type preferable for using in the World Values Survey is a full probability sample of the population aged 18 years and older. Probability sampling allows researchers to create a sample that is accurately representative of the real-life population of interest. For a sampling method to be considered probability sampling, it must utilize random selection:

- **Simple Random Sampling:** all members of the population are included in a master list, and that subjects are then selected randomly from this master list (*requires availability of the registry of all citizens, residents, voters or households; no replacements allowed*). Such sampling approach is used in WVS surveys very rarely, primarily due to most teams having no access to the full registry of citizens (or not available in the



country). It is also a high-cost sample: randomly selected respondents are dispersed which increases the travel costs essentially.

- Most WVS samples are multi-stage samples: a multi-stage sample design is any sample design in which ultimate sample elements are selected through subsequent sampling in two or more superordinate stages.

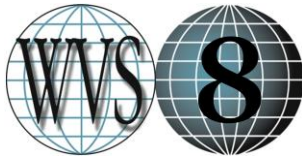
Widespread sampling techniques used in the WVS:

- Stratification: the population is divided into non-overlapping groups, usually based on region, settlement type, settlement size. Almost all samples used in WVS include territorial stratification as the first step. A full list of units (settlements) for each strata is drafted and settlements for the survey are selected applying a random.
- Probability proportional to size (PPS): Probability proportion to size is a sampling procedure under which the probability of a unit being selected is proportional to the size of the ultimate unit. At first stage, larger clusters have bigger probability of being sampled. Sampling exactly the same number of individuals per cluster gives individuals in large clusters have smaller probability of being sampled. Second stage compensates first stage, so that each individual in the population has the same probability of being sampled.
- Cluster sample: is a sampling plan used when mutually homogeneous yet internally heterogeneous groupings are identified in a statistical population. The population within a cluster should ideally be as heterogeneous as possible, but there should be homogeneity between clusters. Cluster can be a block in a city or a territory with equal number of households (i.e. 100 households). If all elements in each sampled cluster are sampled, then this is referred to as a "one-stage" cluster sampling plan. If a simple random subsample of elements is selected within each of these groups, this is referred to as a "two-stage" cluster sampling plan. A common motivation for cluster sampling is to reduce the costs given the desired accuracy.

Whether the sampling method is full probability or a combination of probability and stratified, the national team should aim at obtaining as many Primary Sampling Units (starting points in case of random route sampling) in the sample as possible. It is highly recommended that a number of respondents per a PSU (or a route in case of random route sample) *is not exceeding 10 respondents*. It is possible to have several Primary Sampling Units per one settlement; they should be located in quite a good distance from each other.

Other sampling techniques used in the WVS. To apply probability sampling techniques, a full list of units (settlements, households etc.) within each strata, cluster needs to be drafted and units for the survey to be selected using one of the random, probability techniques. When this is not possible due to the lack of data or other important reasons, alternatives are applied. For example:

- Random route walking is a non-probability technique which can be applied when it's not possible to draw full list of sampling units within cluster. For each randomly-chosen primary sampling unit, interviewers are assigned with a starting location and provided with instructions on the random walking rules e.g., which direction to start,



on which side of the streets to walk and which crossroads to take. Households are selected by interviewers following the instructions.

- Area/ spatial sampling is a method of sampling used when no complete frame of reference is available. The total area under investigation is divided into small sub-areas which are sampled at random or according to a restricted process (stratification of sampling).

Selection of the respondent in the household: next/last birthday, Kish grid, modified techniques based on the Kish grid method.

Online panels in WVS. Panels are not very widespread in the WVS; for a face-to-face survey, the team is expected to draw a territorial sample based on the total population. Panels are primarily used in online survey and postal survey applied in several countries with the WVS.

- Online panels were used on several occasions in the WVS in 6th and 7th waves. ***Online panel*** is a group of selected research participants who have agreed to provide information at specified intervals over an extended period of time by the means of an online survey. Online panel belongs to non-probability sampling methods even though key social and demographic distributions of the surveyed sample can be brought in full accordance with the national distributions. ***Note: online panel refers to a sample and sampling approach; it should not be confused with online self-administered questionnaire as the survey mode.***
- Online panels tend to deliver samples where younger, higher educated, urban residents are over-represented. For most WVS surveys, online panel will need to be combined with other methods (mixed-mode survey) to ensure the sample is representative and no social group is excluded. In the past in the WVS, online panels have been used in the USA, Hong Kong, Malaysia, and Canada. In all countries except for Canada, online panels were complemented by face-to-face or telephone interviews to reach out to certain social and demographic groups.
- Online panels can be used only in societies with high technological advancement and Internet penetration of 90% and higher. Use of online panels is restricted in WVS8 and shall be decided on the case-by-case basis once the pre-survey documentation has been submitted to the WVSA Secretariat.

Depending on the specific conditions in the country, other sample design models are possible and need to be presented to the WVSA. Every national team should develop their sampling model according to the country peculiarities (geographical and administrative division, size of urban and rural settlements, etc.) and existing WVSA methodological requirements.

WVSA requires a complete explanation of proposed sampling procedures ***BEFORE the beginning of the survey fieldwork***. Every national team has to fill in and submit to the Secretariat a Survey Design Form (Annex 3) where the sampling plan which will be applied in the country has to be clearly outlined. The sampling plan must be approved by the WVSA Scientific Advisory Committee in writing as a part of the pre-survey validation. The fieldwork



can be started only *after such a validation* issued by the EC has been provided to a team by the Secretariat.

8. SAMPLE SIZE

There are three main groups of countries in the WVS-8 depending on their sample size:

- The minimum acceptable resultative sample size - i.e. the number of completed interviews which are included into the national dataset upon submission for most of countries is ***N=1200***.
- Countries with the population size of less than 2 million can survey a sample of ***N=1000*** respondents.
- Countries with bigger population and greater population diversity and distribution (Russia, China, Brazil, USA etc.) should aim at ***bigger sample size*** (1500, 1800, 2000, 3000 and more respondents).

The WVSA relies on national team's experience with regard to the optimal national sample size in a particular country. If funding allows, surveying a bigger sample is preferable as this gives more possibilities for data disaggregation by social groups.

If the team would like to survey additional groups (i.e. adolescent) or boost any age/ social group (i.e. females, rural residents), the sample size has to be increased accordingly that the dataset submitted to the WVSA is not less than $N=1200$ cases and correspond to the given society parameters in terms of representativity.

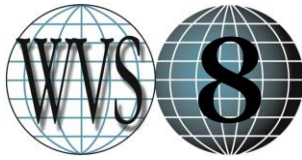
If required, an expert advice from the Scientific Advisory Committee could be obtained. National teams can also check the sample size in a country in a previous wave of the WVSA. The aimed sample size should be indicated in the Survey Design Form and is also subject for the approval by the WVSA.

When there is a shortfall in the achieved sample size, the national team should inform the Secretariat at the earliest possible stage of survey implementation. The Executive Committee in consultation with the Scientific Advisory Committee will decide if the shortfall is notable enough that the study will not be counted as successfully archived and will not be included into the merged dataset or not.

9. NON-RESPONSE

Non-response is an issue of increasing concern in sample surveys. Investigators are expected to make every reasonable effort to minimize non-response. More specifically,

- In countries using a full probability design, no replacements are allowed. PIs should plan on as many call-backs as the funding will allow.
- In countries using stratified sample, every effort should be made to interview the first contact. At least two recalls should be made after the initial visit before replacing the address.
- As a part of the full report on non-responses required as a part of general technical reporting, please, make sure to include the data on response-rate and number of non-responses/ refusals, and the main reasons.



10. SURVEY METHOD

The most widespread method of data collection in the WVS remains *face-to-face interview* which involves personal, direct contact between the interviewer and the respondent. FTF interview remains among the most expensive survey methods, but also the only methodologically acceptable for the WVS survey in quite many countries. Over 90% of interviews in WVS7 (2017-2022) were conducted in FTF mode.

FTF interview can be conducted with the application of paper questionnaire (*PAPI – Paper And Pencil Interview*) or programmed questionnaire on a tablet/ laptop (*CAPI – Computer Assisted Personal Interview*). Due to the complexity of the WVS questionnaire, we generally do not recommend using smartphones for the data collection with CAPI (though needs to be tested in every country). Scripting for CAPI is to be done by every WVS team individually.

Telephone interview is conducted by the interviewers or using Interactive Voice Response (IVR) is not recommended in the WVS due to the questionnaire complexity and length.

Self-administered questionnaire: - paper or online (not the same as online panel!). A probability random sampling frame can be used to identify the gross sample of respondents/ households. After this, the respondents are given a possibility to complete the questionnaire themselves (self-administered = without the interviewer) using the online link to the programmed questionnaire or by sending the questionnaire back by post.

Self-administered online and paper questionnaire method has been used in WVS-7 in Australia and Japan. Postal surveys have been used in Canada in wave 6 and in New Zealand in wave 7. *Response rate* is usually lower for self-administered survey modes (10-20%).

Not suitable for every county: Self-administered surveys can become a cost-efficient solution in countries where face-to-face interviews are very expensive or where the country's territory is very big. At the same time, if there is no developed national culture of postal surveys, the response rate to a postal survey can be as low as 3-5% and thus conducting face-to-face interview at the end will become a cheaper and faster solution.

Self-administered surveys are not suitable for illiterate or low educated groups. Country's median education level needs to be considered when making decision about self-administered survey.

Application of any method other than face-to-face interview *needs to be discussed with the WVSA* with the Scientific Committee granting their approval. Furthermore, every national dataset must include a variable reporting data collection mode.

Incentives for the respondents.

Incentive is a monetary or non-monetary reward that is given to the respondent in exchange for his/her time devoted to the participation in the survey.

Incentives are not prohibited in the WVS. Allocation of incentives is subject to budget availability, correspondence to national legal provisions, survey ethics requirements.



Cash incentives are more efficient to improve the response rate. Small gifts are more difficult to select as those must have universal value to all respondents in order to improve the response rate. Widespread options are shopping or mobile coupons or vouchers. Incentives can be pre-paid or promised.

Incentives can increase the response rate but can also contribute to increasing sample bias and decreasing the quality of the data. For instance, over-representation of a particular social group in your sample can occur (i.e. low-income respondents or some other group – depending on what is the incentive). Or the respondents motivated by incentives only and having no interest in survey topic will rush through the questionnaire without giving proper consideration to the questions and answers.

In WVS-7 and in the past over 95% of surveys have been conducted without incentives (in WVS-7 incentives were used in Germany and Australia).

11. ETHICAL ISSUES AND INFORMED CONSENT

The following ethical guidelines are to be observed by all teams to meet the requirements for *informed consent*:

- WVSA strives to avoid the use of practices or methods that may harm, humiliate, or seriously mislead survey respondents.
- WVSA is obliged to respect the need of informants, respondents or others participating in the research for privacy, confidentiality and data protection.
- Before the interview begins, all respondents must be explicitly informed about the *aims and purposes of the WVS survey*, provided with the project's contact details and the web-site address.
- It is essential to mention that the survey is conducted on behalf of the *World Values Survey, an independent, non-governmental, non-commercial global academic research program*.
- All respondents must be provided with the information that *participation is volunteer and anonymous* and that the *responses will be used in a generalized format only*. In most countries the respondents give explicit oral consent; in some countries where this is required legally or in case if postal survey is taking place such consent can be given in writing.

The following ethical guidelines are to be observed by all teams to meet the requirements for *respondent's anonymity*:

- WVSA considers its responsibility to ensure that no informant, respondent or other research participant is adversely *affected as a result of his/her answers* or of the research process.
- The researcher shall respect respondent's decisions about their participation in the research and use no methods or techniques by which the informant is put in the



position that s/he cannot exercise his/her *right to withdraw* or refuse his/her answers at any stage of the research.

- **Participation in the WVS survey is anonymous.** The respondent can be asked to provide his/her name, family name, phone number for the quality control purposes. However, the respondent has a right to refuse to give this information. In that case only household address is to be recorded and used later for quality control (since WVS employs household-based sample, address will be recorded by the interviewer after the survey interview is finished).

Provisions to guarantee anonymity:

- Anonymity of the WVS data means not that we do not know at all who participated in the survey, but that *personal details of the respondent (name, home address, phone number) can NOT be tracked back to the answers* this person gave us in the interview.
- It is the duty of all WVS national teams to ensure that no response in a survey or other research finding shall be linked in any way to an identifiable respondent. Specifically this presumes that:
- The questionnaire is designed in such way that *no personal details of the respondents are recorded in the questionnaire together with the answers to the survey questions.*
- Personal details of the respondents such as name, family name, telephone or home address which might be required for the survey quality control purposes *can be recorded in the route sheets or on a separate sheet of paper* and used further by the survey team to check that the respondent has been selected correctly in the household, to conduct a second visit to inquire about the interview procedure correctness or to perform interview quality control by telephone.
- Any personal details of the respondent (name, family name, phone number, home address etc.) *should NOT be recorded directly in/ on the questionnaire cover.*
- Unique respondent identification number can be allocated to each case to be able to link the questionnaire to the personal details records for the quality control purposes.

Personal data protection provisions:

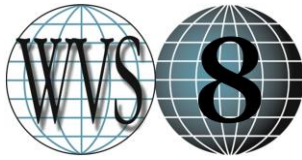
- Personal details of the respondents (such as name, family name, phone number, home address etc.) are to be collected separately, but also must be *stored separately* from the questionnaires/ data-set.
- Personal details of the respondents can be used for *quality control* purposes by the WVS national team.
- Personal details of the respondents are *NOT to be submitted to the WWSA* (neither in the data-set, not separately).



- Personal details of the respondents are to be stored by the WVS national team in the country as long as the WVSA Data archive and Secretariat are engaged with the data cleaning for this country. Personal details of the respondents ***can be provided to the WVSA Data archive upon request***, for additional quality control measures. The records are destroyed by the Data archive after the quality control is completed
- All WVS survey team should use the existing national legislature for the guidance on the ***next steps in working with the respondents' personal details*** (i.e. in some countries those are required to be stored for 3 years and then destroyed).
- WVSA data-sets, both those released to the public via the WVSA official web-site and those stored at the WVSA Data archive, including the raw and working versions before cleaning, do not contain any personal information of the respondents that could be used to track the identity or location of the respondent.
- All WVS national teams who store respondents' personal data are obliged to provide the necessary security measures to prevent unauthorized access and breach into the privacy of the respondents.
- In case of ***postal surveys***, signed informed consent forms, postal addresses of the respondents or any other personal details of the respondents are collected and stored separately from the survey data (answers to the survey questionnaire); personal data can be stored by the national team for up to 3 years period of time for quality control purposes. After this all personal data is destroyed.
- In case of self-administered online survey, personal data is not collected.

Geocodes collection in WVS wave 8:

- In wave 8 (2024-2026), WVSA requires collection of the ***GPS location*** where the interview took place. Information is used as a supplementary in the quality control procedures as well as for the analysis of regional answers distributions.
- For this, the interviewers are instructed to collect ***geographical coordinates of the administrative building/ facility*** in the neighbourhood where the series/ route/ PSU of interviews takes place. Those can be coordinates of a school, church, central square etc.
- To ensure anonymity and privacy of the respondents' participation in the survey process, the geocodes should never be collected directly at the household of the respondent and ***should not point to the private household address***, but to the near administrative building/ facility only.
- The geocodes are collected in ***rounded format*** XX.XX and YY.YY (2 decimals only) which is another security measure to prevent the deductive disclosure of the respondent's identity or home address. In most cases, all interviews conducted within one PSU will have the same set of geocodes.



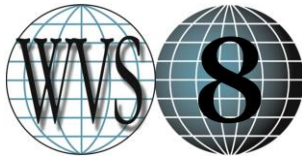
12. INTERVIEW PROCESS: MISSION OF THE INTERVIEWER, RULES FOR INTERVIEWERS

General provisions:

- The interviewer has to be *motivated* and has to be able to communicate that motivation to the respondent. Often, this means that the interviewer has to be convinced of the importance of the research.
- Interviewers have to be able to *think on their feet*. Respondents may raise objections or concerns that were not anticipated. The interviewer has to be able to respond candidly and informatively.
- Interviewers must **observe the quality of responses**. Some respondents are motivated and attentive, others are distracted or disinterested. The interviewer also has good or bad days. Assuring a consistently high-quality interview is a challenge that requires constant effort.
- *Being an interviewer is a special talent!*
- WVS national team is obliged to *plan the work load of the interviewers carefully* (number of interviews per day) to avoid any deterioration to the interviews quality.

Tasks and Qualities of the Interviewers:

- Locating the structure and households in the sample that are assigned to them, and administering the questionnaires (*=good spatial orientation; knowledge of territory, addresses, street names, can use maps etc.*);
- Identifying all eligible respondents (*=good knowledge of eligibility rules, honesty not to “exclude” the relevant respondent from the list*);
- Establishing primary contact with the household and the relevant respondent before the interview (*=good communication skills*);
- Making re-visits to interview respondents who could not be interviewed during the first or second visit due to various reasons;
- Checking completed interviews to be sure that all questions were asked (*=attentive, good knowledge of the questionnaire structure*);
- Ensuring that the information given is correct by keeping the respondent focused to the questions (*=observative, checks on the respondent’s interest and engagement during the interview process*);
- Including their specific observations or notes on the last page of each questionnaire (*=complete section observations by the interviewer*);
- Preparing additional notes for the field editor and supervisor on other problems or observations (*=complete route sheets*).

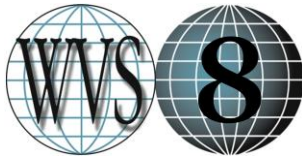


General rules for interviewers:

- ***Differences in interviewers' qualifications and skills can result in interviewer effects, i.e. variations in the responses to survey questions that can be traced back to the interviewer.***
- Given the complexity of the WVS-8 questionnaire, it is highly preferable that the survey is conducted by the ***interviewers with at least 3 years of experience*** in population surveys.
- ***The respondent's first impression of you will influence her/his willingness to participate in the survey.*** Make sure that your appearance is neat and you also appear friendly as you introduce yourself.
- Interviewer's clothing, outlook must be neutral and in accordance with the cultural requirements in the country (i.e. having too expensive clothes or jewellery on you might make prevent trust-building with low-income respondents and make them uncomfortable and tense). Where applicable, same-gender rule for the respondent and interviewer should be followed.
- Interviewer's communication skills, voice, clarity of speech are also to be considered and trained if required.

Introduction of the interviewer

- All interviewers conducting data collection for the WVS survey are obliged to ***introduce themselves*** properly to the respondent.
- Interviewers must give their ***name and family name*** as well as the ***name of the local organization*** conducting the WVS survey in the country.
- Respondents should be provided with the ***contact details*** of this organization in case if they have any questions, would like to obtain more information or to report about the problems which occurred during the interview.
- In case the survey is supported from the state funds or is conducted by a ***state organization***, the research team is supposed to prepare the introductory statement for the interviewer in such a way that the respondents will experience ***no pressure*** to participate or encouragement to give ***untruthful, biased answers***.
- WVS team in every country shall provide their interviewers with the following items in the field to establish their legitimacy: ***official identification from the survey organization; official letters to local authorities describing the study, if appropriate; other letters of permission or support from local authorities if appropriate and/or necessary given the local social context and governmental regulations.***



Securing consent to participate in the survey:

- Depending on the applicable methodology, the respondent in the household should be selected using one of the random techniques.
- Correctly selected respondent needs to be informed on the survey mission and goals, importance of his/ her participation, selection process, data usage in future etc.
- It is essential to secure respondent's ***consent to complete the survey interview fully***. The average duration of the WVS-8 interview is 40 minutes.
- Do not inform the respondent on the longest possible duration (i.e. can reach up to 2 hours) not to scare them away – as maybe his interview will last much shorter. But make sure the respondent is available for the 30-40 minutes conversation.
- The interview can be split into 2 parts (if agreeable with the team and methodology); then second half of the questionnaire can be answered during the second visit (by the same respondent!).
- If the respondent is highly educated, it is acceptable to allow self-completion of the questionnaire.
- ***It is not allowed to leave the printed questionnaire at the respondent's household and collect it upon completion*** (it is interviewer's task to control that only the selected respondent answers the questionnaire).

Basic key requirements to interviews in WVS: Individual and Private

- Regardless of the selected interview mode, WVS survey is a survey of ***individual respondents and NOT households***. In practical terms this means that *all answers in one questionnaire must belong to one and the same person only*. Second family member cannot finish answering if your respondent got tired half-way through the questionnaire! If you are using self-administered survey mode, include this information into the introduction.
- ***Ensure privacy for each interview***: explain to other household members that in accordance with the required methodology for this international project the communication shall take place only between the interviewer and the respondent.
- ***Other family members should not participate in the interview*** – neither passively (sit and listen because they are curious, bored etc.) nor in active mode (give advice how to respond or correct the given answers of the respondent). This becomes a challenge in traditional, rural communities. From the WVS-7 experience, primarily in the Middle East and Asian countries interview privacy is not always maintained (*20-60% of interviews weren't private*).
- **Interviewer must balance between persistency in following the rule of interview privacy and avoiding a situation when interview is refused, or a conflict situation**

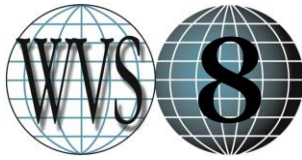


occurs. Interviewers should attempt to keep the interview as private as possible, while still respecting cultural norms.

- If it is not possible to conduct the interview in private and to maintain the privacy of the respondent's answers, self-administered answers to sensitive questions can be used (i.e. respondent completes parts of the questionnaire him/herself without the interviewer reading the questions and the answers).
- In some cultures, same gender for interviewer and respondent rule might need to be followed. If that's not possible, the interviewers can conduct interviews in a place that is visible to the male head of household but out of earshot.
- In some rural places it might not always be feasible to conduct an interview inside a home and may have to take place outside and in a more public setting. In other rural places, the survey interview is still a novel concept, making interview privacy difficult to attain.
- After the interview is completed, interviewer should *code F_Interview privacy*.

Interviewers during the interview:

- First of all, make sure to explain to the respondent that: *there are no right or wrong answers to any question; each question's aim is simply to learn the respondent's opinion – whatever this opinion is.* The respondent must obtain a clear understanding that survey is not a knowledge or intelligence test. Survey is aimed to inquire about the respondent's opinion; this opinion -exactly how it is- is very valuable to the researchers.
- **The interviewer should not express their own opinion** about the matters/ topics concerned in the questionnaire. *The respondent should not feel encouraged to agree with any answer option or ashamed to express his/ her own opinion.*
- **The interviewer should not give any evaluation** or comments on the respondent's answers – regardless if the interviewer agrees or disagrees with those. *Respondent shall feel absolutely free to express his/ her opinion as it is.*
- **The interviewer should avoid giving any advices** how to respond to a particular question. *It is the respondent's opinion that we want to learn about.*
- **The interviewer should read all questions texts exactly as they are formulated in the questionnaire and exactly in the same sequence as they are.** It is strictly prohibited to re-phrase the questions or to use own words to explain the meaning. If a question sounds unclear, clarify the meaning with the supervisor during training session prior to fieldwork. Representatives of the WVS national team can contact WVSA Secretariat for additional clarifications.
- **Such codes as “not applicable” or “hard to say” are not to be read to the respondent** (note: in self-administered surveys these codes are included explicitly). The interviewer should code “hard to say” only if the respondent says so him/herself



without you hinting this as an answer option. Battery on democracy features: answer option “0=*this is against democracy*” also not to be read out and to be coded only if mentioned by the respondent him/herself. “Not applicable” refers to questions which can not be applied to the respondent for objective reasons.

Using cards in the interview

- Cards are meant to ease the task of the interviewer to read aloud all answer options.
- Cards are recommended where the respondent needs to select one or several options from a list.
- Long batteries do not imply using cards where the respondent is supposed to express his/her opinion on every item in the battery – and thus every item needs to be read aloud.
- WVS-8 questionnaire includes recommendations on where the card can be useful.
- Depending on the language peculiarities, team’s past experience and other factors the number of questions where the card is used can be increased or reduced (i.e. you can add cards where you think they can be helpful and not make a card where you think it is not that necessary).

Sensitive topics

- Depending on the cultural context, some issues might appear more or less relevant or sensitive in the conversation with the respondent.
- **Relevance:** “*Why we ask about migrants if there is little migration in this country?*” The survey is an international, global project. We ask about perceptions of people to the same things in over 100 world countries. It is natural to expect that different topics will be more or less relevant in different countries.
- **Non-partisan survey:** WVS-8 questionnaire asks questions on attitudes to different forms of political rule. At the same time, WVSA is a non-partisan research organization. There is no political ideology behind the survey. *By asking what the respondents think about different political processes and phenomena, we do NOT promote any form of political governance; we do NOT invite any form of political engagement.*
- **Sensitive topics:** WVS-8 questionnaire contains a number of questions about perceptions of such ethically sensitive topics as LGBT relations, abortion, euthanasia etc. *By asking these questions, we do NOT advocate or promote acceptance or non-acceptance of any of these phenomena. There is no aim of the WVS survey other than research.*



Common fraud cases and mistakes in interviewing:

- **No interview took place:** questionnaires completed by the interviewers themselves at home are easily detected by the WVSA Data archive. It is the task of the national team to ensure fraud does not take place or the interviews are replaced in due course.
- **Wrong respondent surveyed:** WVSA recommends the national teams to introduce fines up to total non-acceptance of the interviews conducted not with the relevant respondent (example: if the relevant respondent is not available at the household, replacing this respondent with another family member and not including the right respondent into the list of all household members is a fraud – same as falsifying the birthday date if next/last birthday is used for the respondent selection).
- **Responses given by another person:** another widespread type of fraud is when the demography and other details of the “correct” respondent are provided, but all answers were given by another family member because the relevant respondent was not available at the time of interviewer’s visit. Values and perceptions studied by the WVS differ between age groups, males and females, education groups, social classes. Substituting answers of a “male” respondent with the opinion of a “female” respondent will contribute to delivering a misleading data-set. It is the team’s responsibility to reveal and replace such cases. WVS is a public data-set. For countries where data is claimed implausible by the data-users, WVSA replaced the national partner in the country.
- **Interview completed not fully, skipping “unimportant” questions:** for the interviewer it is prohibited to draw answers him/herself to any questions basing on previous answers of the respondent – i.e. if the respondent says he trusts the government, does not automatically means he also trusts the parliament. Don’t skip any questions, they are all equally important.

Safety and security for interviewer and respondent:

- Interviewer’s and respondent’s safety is of primary and utmost importance to the WVSA. Teams in the countries involved into military or civil conflicts need to exclude dangerous territories from the sample; postpone the survey or give extensive training on safety for the interviewers and the respondents.
- In all countries: if the approached household looks as such where life, health or safety of the interviewer can be threatened (illegal activities, drunken parties, domestic violence etc.), the interviewer should not enter the house. The address should be excluded from the survey.
- Decide whether interviewers should travel in groups and be accompanied by security personnel.
- Have interviewers visit their work areas during the daytime before the first day of data collection. They should check for potential hazards and safe havens during this visit.



- In cases of suspected domestic violence, violence against children in the household: every national team must instruct the interviewers on the procedures in accordance with the national legislation. In some countries it is required to report such cases under the law.
- It is top-priority to ensure that neither of the respondent's actions (interview itself or approaching the household) will cause any harm to the respondent – directly or indirectly.

13. QUALITY CONTROL PROCEDURES

In accordance with the research requirements every WVS survey team has to conduct a compulsory internal quality control. To monitor the quality of collected data, the internal quality control of interviewers' work should be undertaken in two stages.

At the first stage, supervisors have to monitor during the fieldwork how interviewers fulfil their tasks according to the current Guidance, WAPOR and ESOMAR principles and rules of data collection, among them:

- accuracy of probability or random route procedure application;
- correctness of selection of households and respondents;
- correctness of filled in route / contact sheets;
- quality of filled in questionnaire: completion, accuracy and uniformity;
- logical verification of data.

Supervisors have also to visit several households where WVS-8 has been conducted to verify the fact of the interview and details related to its implementation (duration, questions which have been asked, interviewer behavior etc.). Results of the quality control check, notes about the occurred problems and solutions should be included into the Methodology questionnaire submitted after the survey fieldwork (Annex 4).

It is highly recommendable to initiate the quality control procedures during the phase of data collection, mainly to avoid the need for massive replacements, as the supervisor could give immediate feedback to interviewers if conformity issues were discovered.

At the second stage, the quality control group of the organization has to verify at least 10% from the total sample by back-checking: repeated visits to the respondents or phone calls. By this procedure should be verified: fact and date of interview; correctness of household and respondent selection; age and sex of respondent; theme of interview; use of cards; length of interview, answers to some questions.

In case if any interviews were conducted with violation of the rules or have not been confirmed during the quality control procedures, they have to be replaced. Interview shall be replaced if the controls reveals that the respondent was deliberately substituted with another family member. Uncompleted interviews, interviews with over 20% of “*don't know*” and “*refuse to say*” answers shall be replaced.



14. SUBMISSION OF DATA AND THE FINAL REPORT

After completion of the survey, PIs are responsible for turning in a cleaned and complete data set to the WVSA as soon as feasible. PIs also agree to answer inquiries by the WVSA regarding their data set without undue delay.

Please, follow the 4 main rules for data submission:

- The national dataset and all related documentation must be submitted to the WVSA no later than 3 months after the survey was completed. The data-set and all the related documentation must be submitted to WVSA Secretariat (wvsa.secretariat@gmail.com).
- The national dataset should be submitted as one single file and must be obligatory accompanied by the technical and contextual report describing main technical parameters of the data collection process as well as containing some country-specific information (e.g. important political events prior to or during the fieldwork, problems particular to that country etc.) in Methodology Questionnaire (Annex 4).
- The national dataset must be submitted to the WVSA in its original version, i.e. PIs should not change the survey data, nor apply any cleaning transformations on their side. If any change or recoding is needed, it should be documented in the technical report. The document should clearly state which re-codings have been done and why. Variables that have been computed, instead of asked, should also be documented.
- All the teams are required to pay *a fee to cover expenses related to data cleaning*, data storage, production of WVS-8 aggregated dataset and WVS1-8 longitudinal data-set and maintaining the data-sets for the next 5 years (duration of the wave) which will be implemented by the WVSA Data archive. The fee is calculated as about 10% of survey fieldwork costs. The payment is made as a lump sum one time per country per wave.

15. ACCEPTANCE AND SHARING OF DATA SETS

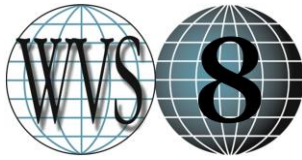
No survey that does not fully and completely adhere to the rules described above will be accepted. Once a country's survey is accepted, its PI and her/his colleagues will have full and immediate access to all surveys completed to date, as well as to those that will be submitted later. WVSA Secretariat and the EC are responsible for keeping PIs informed about the status of all surveys (funding, starting date, completion date, acceptance, etc.).

The dataset itself is not to be redistributed outside the team of the PI until it will be released for public use and secondary analysis (approximately in 2026).

After submitting an accepted file for a country, the PI is given full access to all other countries in the ongoing and all previous waves. This includes free use of the data for publications in articles, books etc. but it is not allowed to redistribute data to third parties (i.e. other colleagues, other organizations etc.). When the data is used, there should always be a correct reference to the World Values Survey.

The PI undertakes all necessary efforts to comply with data protection legislation, and to keep personal data secure, and to only use such data in accordance with data protection legislation.

Many thanks for your cooperation to insure the highest standards of survey fieldwork and data collection!



15. CHECK LIST OF DELIVERABLES TO BE SUBMITTED BY YOUR TEAM

The following documents have to be submitted to the WVSA Secretariat **BEFORE** the fieldwork is started:

- ✓ Completed and signed Letter of consent (Annex 1);
- ✓ Completed Information about the organization (Annex 2);
- ✓ Completed Survey Design Form (Annex 3);
- ✓ Translated questionnaire(s) which will be used in the survey fieldwork;
- ✓ Brief report on translated questionnaire pre-test in your country;
- ✓ Detailed sampling list (list of PSUs).

After the approval of your pre-survey documentation, you will receive a formal letter signed by the President of the WVSA confirming approval of the sampling model, survey method and the questionnaire translation. After this, data collection can be started.

The following documents have to be submitted to the WVSA Secretariat **AFTER** the fieldwork is started:

- ✓ National data-set as SPSS file, cleaned but not weighted;
- ✓ Completed Methodology Questionnaire (Annex 4);
- ✓ Any other relevant documents, materials, explanations or clarifications.

Please, note that your data set can only be included into the WVS wave 78 data-set if all deliverables are provided.

In case if your team obtained co-funding from the WVSA Secretariat for the implementation of WVS-8 in your country, the final payment will be provided only after full documentation has been submitted.

Submission of deliverables to:

WVSA Secretariat

Institute for Comparative Survey Research, Vienna, Austria

Email: wvsa.secretariat@gmail.com