



Survey on Retailers' attitudes towards cross-border trade and consumer protection 2018

Technical Report

KANTAR PUBLIC=

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1. SUMMARY

The technical aspects of the Retailers' attitudes towards cross-border trade and consumer protection 2018 are presented in this document. This survey follows on from a series of consumer protection surveys targeting retailers, conducted since 2006 on behalf of the European Commission.

As detailed in the next pages, all activities related to survey setup, questionnaire testing, sampling, fieldwork and weighting and data processing remain consistent with the prior waves of the survey.

Response rate

According to the American Association of Public Opinion Research's (AAPOR) standard definition, the response rate (which is different from the cooperation rate and the contact rate) is the number of complete interviews divided by the number of eligible units in the sample¹. The response rate for the Retailers' 2018 survey is as follow:

Eligible units		
Full responses obtained (I)		10,756
Only partial responses obtained (P)		20
Eligible non-responding units		298,907
Refusals (R)	118,565	
Non-contact (NC)	37,327	
Other (O)	1,573	
Non-responding units with unknown eligibility (UH)		12,651
Estimated proportion of UH cases that are eligible (e)		0.590
Non-eligible units (UO)		1,329

Based on these figures, the response rates, according to different measures approved by the AAPOR (RR1, RR3 and RR4), are presented below.

RR1	$I / (I + P) + (R + NC + O) + (UH + UO)$	0.059
RR3	$I / [(I + P) + (R + NC + O) + e * (UH + UO)]$	0.061
RR4	$(I + P) / [(I + P) + (R + NC + O) + e * (UH + UO)]$	0.061

The difference between RR1 and RR3 is how samples with unknown eligibility status are treated; RR1 includes them in the denominator (most conservative approach), while RR3 applies an eligibility factor. RR4 further treats partial interviews as interviews in the numerator.

¹ <http://www.aapor.org/Education-Resources/For-Researchers/Poll-Survey-FAQ/Response-Rates-An-Overview.aspx>

2. CO-ORDINATION

All aspects of the survey setup and project management were centrally organised.

For instance, all national versions of the bilingual questionnaire were validated by the Coordination Centre and scripted into a questionnaire form in a single computer language (ODIN) by the Kantar e-Call Centre. These scripts were then submitted to and controlled by the International DP team. These scripts use the data of Kantar's translation tool to integrate automatically, without any human involvement (potential source of errors), the national translations.

The Kantar e-Call Centre worked under the principle of this centralisation, with the following advantages:

- The guarantee that the questionnaire instructions were applied in a homogeneous way in all countries (filters, rotation, etc.);
- Risks of transposition errors during the production of the electronic scripts were eliminated;
- Scripts were produced and verified rapidly by the Coordination Centre, as well as by each one of the national call centre offices.

3. TARGET POPULATION

The universe or target population of the survey has been defined with the following criteria of company eligibility:

- Companies established in the countries included in the survey, i.e. the EU27_2019² Member States, plus Iceland, Norway and the United Kingdom;
- Companies selling goods or services directly to final consumers;
- Companies employing at least 10 persons;
- Companies in the economic sectors corresponding to the NACE codes G45, G47, H49, H50, H51, H52, H53, I55, I56, J61, J62, K64, K65, L68, N77, N79 and S95, all of which had been included in previous waves of the Retailers' survey; as well as D3512, D3514, D3523, J5914 and S96, which have been incorporated in this wave.

Within these companies, eligible respondents were individuals with decision-making responsibilities, either at the general or commercial level.

For most countries, except for Iceland and Ireland, the universe data is taken from the Eurostat Structural business statistics (SBS) database. The SBS database covers industry, construction, trade and services, and enables to arrange the data entries by size of enterprises. This source is thus very well-suited to provide reliable and consistent universe data in a large majority of cases.

² The EU as it will be in 2019 – excluding the United Kingdom.

To solve coverage limitations for financial services and other personal service activities, the distribution of the population data (by NACE codes and number of employees) was approximated using the counts provided by the Dun & Bradstreet (D&B) database. From experience, the coverage of these specific sectors by D&B has indeed proven very reliable.

For Ireland, the distribution of companies by sector from the Central Statistics Office (CSO) was used and compared to that of the Bill Moss database. For Iceland, Statistics Iceland (Stative) provides official data only at level 1 NACE codes, due to the small population; therefore, this data was used for the level 1 NACE sectors when all sub-level sectors are included in the universe (H, I, L). For the other sectors, the universe is defined by estimating the proportion of the level 1 NACE code which should be covered by each level 2 NACE codes, according to the sample sources.

4. MODE OF INTERVIEWING

This survey's main fieldwork was carried out by the Kantar Public network in the EU27_2019 Member States, as well as in Iceland, Norway and the United Kingdom, between 2nd May and 27th June 2018. All interviews were made through phone calls from the Kantar e-Call centre (a centralised CATI system).

5. LANGUAGES OF INTERVIEWING

Interviews were conducted in the following languages:

Country	Language	Abbreviation
Austria	German	DE
Belgium	French	FR
	Dutch	NL
Bulgaria	Bulgarian	BG
Croatia	Croatian	HR
Republic of Cyprus	Greek	EL
Czech Republic	Czech	CS
Denmark	Danish	DA
Estonia	Estonian	ET
	Russian	RU
Finland	Finnish	FI
	Swedish	SV
France	French	FR
Germany	German	DE
Greece	Greek	EL
Hungary	Hungarian	HU
Iceland	Icelandic	IS
Ireland	English	EN
	Irish	GA
Italy	Italian	IT
Latvia	Latvian	LV
	Russian	RU
Lithuania	Lithuanian	LT
Luxembourg	Luxembourgish	LB
	German	DE
	French	FR
Malta	English	EN
	Maltese	MT
Netherlands	Dutch	NL
Norway	Norwegian	NO
Poland	Polish	PL
Portugal	Portuguese	PT
Romania	Romanian	RO
Slovakia	Slovak	SK
Slovenia	Slovenian	SL
Spain	Spanish	ES
Sweden	Swedish	SV
United Kingdom	English	EN

6. SAMPLING

While in some of the countries covered by the survey, business registers are made accessible by public authorities, experience has proven that such business registers cannot be always used for sampling purposes, due to the low quality of contact details provided and to the lack of regular updates.

To fill these gaps, commercial business databases have proven to be the best alternative, to make sure that the contact details of companies are comprehensive, detailed and up-to-date.

The best sampling frames are those that maximise coverage of the target population, easy access to the sampling units, up to date contact information, and low proportion of ineligible units. Based on contractor's experience, in most cases, BvD/Orbis provides the most reliable information. In a few countries however, using a mix of D&B and BvD/Orbis provides the optimal solution, while in a small number of cases, a combination of several sources including national registries was used, where neither of the sample frames of choice is able to provide sufficiently high coverage of the universe.

The table below lists the sample sources used in each country covered by the survey. The contact coverage statistic compares the count of enterprises with telephone numbers on the business database with the enterprise population taken from Eurostat.

Country	Sample source	Contact coverage
Austria	BvD/Orbis	61%
Belgium	BvD/Orbis	82%
Bulgaria	BvD/Orbis	99%
Croatia	BvD/Orbis	65%
Cyprus	D&B + BvD/Orbis + local registrar	75%
Czech Republic	BvD/Orbis	86%
Denmark	BvD/Orbis	65%
Estonia	BvD/Orbis	93%
Finland	BvD/Orbis	76%
France	BvD/Orbis	73%
Germany	BvD/Orbis	76%
Greece	BvD/Orbis	67%
Hungary	BvD/Orbis	65%
Iceland	D&B + BvD/Orbis	82%
Ireland	Bill Moss	89%
Italy	BvD/Orbis	70%
Latvia	BvD/Orbis	97%
Lithuania	BvD/Orbis	96%
Luxembourg	BvD/Orbis	81%
Malta	D&B + BvD/Orbis + local statistics office	98%
Netherlands	BvD/Orbis	94%
Norway	BvD/Orbis	84%
Poland	BvD/Orbis	92%
Portugal	BvD/Orbis	90%
Romania	BvD/Orbis	86%
Slovakia	BvD/Orbis	94%
Slovenia	BvD/Orbis	66%
Spain	BvD/Orbis	72%
Sweden	BvD/Orbis	91%
United Kingdom	BvD/Orbis	63%

The sample size was defined per country; the target was 400 interviews for most countries, with the following exceptions:

- 150 interviews for Cyprus, Malta and Iceland;
- 130 interviews for Luxembourg.

For the sample design, quotas were applied per country, per company size and per sector to enhance representativeness of the sample. These quotas were first set at country level and adjusted according to the country's universe. They were also reasoned in order to ensure that the sample was large enough in every cell. Three company size categories (namely 10 to 49 employees, 50 to 249 employees, and 250 or more employees) and two sectors (trade and services) were defined, thus six sub-samples or cells resulted per country from this stratification. Within each of these cells, a random sample approach was used to contact potential respondents.

7. QUESTIONNAIRE TRANSLATION AND TESTING

Pilot testing

In line with the 2016 survey, the questionnaire was pre-tested in all countries, to evaluate possible national issues regarding the clarity and understanding of the questions of the Retailers survey.

This pilot phase was carried out in all 30 countries covered by the survey (n=10 respondents per country), between 21 and 29 March 2018.

Each national institute responsible of carrying out fieldwork were provided with a detailed feedback template through which they were asked to give their comments and possible recommendations on the survey as a whole and more specifically on eight (8) questions which have been identified in previous waves as potentially challenging in terms of clarity. This feedback grid served as a guide with specific probing questions, but national institutes were asked to provide all feedback elements they judged relevant to optimise the questionnaire.

Overall, the questionnaire was perceived as clear by most respondents and interviewers across all countries.

However, the following global challenges - most of them had been mentioned in 2016 as well - were mentioned by interviewers from several countries:

- Overall, and similarly to previous waves, several respondents had a feeling that this questionnaire is focused more on goods than services. As indicated in the following pages, several companies selling services (restaurants, hotels, etc.) found it hard to answer some questions (especially Q3A, Q3b, Q4b and Q5) which they considered irrelevant to their activity and reality. This also applies to some extent to retailers who do not make cross-border sales.
 - Several respondents got frustrated when answering such questions. In order to avoid this situation, some interviewers suggest these questions should be filtered.

- In line with the 2016 survey, many respondents complained about the length of the interview.
 - This was accentuated when respondents considered the questionnaire irrelevant to their business (selling only locally, selling services and not goods, etc.).
 - This often caused frustration and irritation from the respondents.
 - As a consequence, many countries expressed concerns about the very low strike rate, due to high refusal rates, as well as important dropouts during the interview due to this excessive length.

The detailed changes to the questionnaire following the pilot testing can be found in the dedicated "Pilot Report".

Translation

Following the pilot, an improved version of the questionnaire was prepared in English for the main fieldwork.

Naturally, all modified questions and instructions were translated in the local languages of all countries covered by the survey. Questions and instructions in the English language questionnaire that were asked in previous waves and not modified remained unchanged in other languages. The translation process followed the process used for Eurobarometer surveys for many years:

1. Initially, **two independent translations** of the questions and instructions that had been added or modified following the cognitive and pilot testing.
2. These two translations were then **reviewed by a third translation expert**, who then met with both translators in order to find a consensus on any possible discrepancy between both translations.
3. This final translation was then **back-translated into English** and any discrepancy between the original and the back-translated version were discussed.

All translations were presented to the CHAFEA / DG JUST team, who had the opportunity to make additional comments and request for some changes to be implemented.

8. PREPARATION OF THE FIELDWORK, DATA COLLECTION AND MINIMISATION OF NON-RESPONSE

Several steps were taken, before, during and after data collection, in order to minimise the non-response and thus to maximise the quality data.

Training and briefing

The briefing process and content was designed and implemented in a consistent way for all countries/territories covered by the study.

The **Interviewer Instruction Manual** constitutes the written pillar of the training for interviewers. It was updated and adapted following the cognitive and the pilot phases, in order to reflect and explain all changes decided after the testing phases. More specifically, it contains a detailed description for:

- all those questions in the questionnaire which have any special features (filter, rotation, multi-responses, pre-coded spontaneous questions, etc.);
- all those questions in the questionnaire that need a specific contextual attention (for example the sense of a question or the way it should be administered);
- particularly challenging questions.

The training also focused on properly **managing the sample and completing the progress report**. Interviewers were explained how important each selected record is, in order for them to understand the consequences of achieving a high response rate. In addition, they were briefed on the progress report; this key piece for the survey success was used to record the results of all contacts, appointments, outcomes, and the results of quality control procedures including spot checks and call-backs. Interviewers were supplied with a significant number of practical cases and recommendations, in order to allow them to code the screeners correctly.

A precise definition, together with examples, was provided for each of the codes included in the screeners, in order to gather standardized data on the refusal reasons, enabling us to guarantee a response rate calculation based on comparable aspects.

The **selection process of respondents**: the briefing also provided a precise and easily understandable definition of the target population (the owner, managing director, etc.), in order to make sure that the right respondent is contacted.

The 'interviewer manual' presented in detail the questions to be asked to the contact person (the person who answers the phone) to reach the correct target profile within the organisation. It also suggested a series of procedures to be respected by the interviewer in order to maximize the chance that the person eligible in the firm participated in the survey.

Instructions to convert refusals into response: Once a contact has been established, it is important that the interviewer has all arguments to persuade. Each interviewer was trained and briefed to maximize participation from respondents. In order to minimise the number of refusals, the briefing also contained practical instructions based on these recommendations.

Fieldwork length

The fieldwork of the main survey was launched on Wednesday May 2nd, with other countries starting a day or two later. Fieldwork had commenced in all countries by Friday May 4th. Initially planned to last until June 8th, the fieldwork period had to be extended until June 27th, due to the inability to reach the target in a number of countries. These countries included Luxembourg and Cyprus as in previous years, but also Croatia and the Czech Republic where there were also challenges in meeting the target. Although these were the only four countries where the target was not reached, there were difficulties in almost all countries.

Minimising non-response

In addition to extensive training and supervision of interviewers and to increasing the duration of the fieldwork, further processes were implemented in order to maximise the success in achieving interviews amongst the target population.

From analysis of Flash Eurobarometer surveys' outcomes, a programme to maximise the response by time of day and day of week was designed, making sure that all calls other than appointments were conducted between 9:00 and 20:00 on weekdays and also Saturdays in some countries. Most calls were made within normal working hours (i.e. 9-6), however it proved useful to include evening calls for certain sectors.

To improve the response rate, the following measures were implemented:

- If the target was absent, the interviewer made a soft appointment to call back another day or time;
- A strong flexibility was offered for appointments e.g. if respondent wished to be called in evening or weekend.

All calls that were non-contacts were redialled at least 5 times. The recall pattern was programmed in the dialler to ensure that they took place at different times and on different days.

9. DATA EDITING, PROCESSING AND VALIDATION

The centralised programming allowed by the Kantar e-Call Centre infrastructure helped minimise the possibility of data error due to scripting issues. In addition, data editing and processing were handled by the central data processing team, with on-going quality checks and consistent data editing across all countries.

Data editing

Data was collected at national level via CATI. Data was encoded at national level in accordance with the precise instructions given by the Coordination Centre. The use of the Kantar e-Call Centre guarantees the consistency of encoding, in particular by ensuring compliance with two vital stages carried out before the launch of a survey:

- The automatic, centralised production of the CATI scripts by Kantar e-Call Centre using a bespoke single questionnaire platform. This allowed to eliminate the manual editing stage of the survey scripts at country level, as well as all the risks of the incorrect transposition of the approved translation. This centralised platform guarantees that data falls within a pre-determined range, filters are applied automatically and correctly via central scripting. The CATI programming doesn't allow for missing items or outliers.
- Given that all the national agencies used the same platform for their translation, no difference between the approved translation and the content of the final questionnaire administered to the respondents could take place.

Data processing and validation

The **data processing** is a major stage, namely to ensure that:

- the encoding and cleaning of data are strictly controlled;
- the raw sample is correctly weighted in order to ensure that it is fully representative at national level.

By providing the same script of the questionnaire valid for all national call centres and already translated into all the languages covered by the survey, the Kantar e-Call Centre ensured that the encoding rules rejected wrong codes and inconsistent answers.

In addition, this automated process ensured that the data files provided by the countries were operational and consistent, which was guaranteed by the application of systematic national data control rules and the reduced human contribution.

10. WEIGHTING

During data processing, **three sets of weights** were calculated.

On the one hand, a weight based upon the distribution of the country populations by company size categories and by the two sectors, trade and services, was computed. This weight also follows the same scope as previous Retailers' surveys (thus excluding some sectors in the current wave). This weight is referred to as Weight 0 or old methodology in the Report and the dataset, and it is used to compare current and previous results.

On the other hand, the weighting procedure used in previous waves was adapted to take into account only companies selling to final consumers and the new scope of the population. This weight also uses the same reference of the number of companies in the population by company size and sector. This is referred to in the Report and the dataset as Weight 1.

Upon request from the Contracting authority, a third weighting scheme was added in the 2016 wave to present results based on the number of persons employed (rather than the number of companies); this is referred to as Weight 2.

11. ESTIMATION OF STANDARD ERRORS

The sampling error for a given sample is unknown but when the sampling is random, the maximum likely size of the sampling error is called the margin of error. The margin of error is a mathematical calculation based on a confidence level of 95% for confidence intervals for each population proportion.

Statistical Margins due to the sampling process (at the 95% level of confidence)

various sample sizes are in rows

various observed results are in columns

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

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