Working Status
Best practice recommendations for multi-country work.

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Introduction

ESOMAR, through its Professional Standards Committee, is developing recommendations on demographic standards to address inconsistencies that create barriers and inefficiencies in the exchange and evaluation of international data and present an inaccurate and sometimes distorted view. These recommendations, founded on evidence-based best practices, are designed to improve quality standards and facilitate the rapid creation of multi-country research projects and surveys to better provide meaningful global/regional results that can be more easily compared from one project to another. The objective is, therefore, to describe demographic groups in as globally consistent a way as possible and to develop a common demographic structure.

The work has been carried out by a dedicated expert workgroup and validated by the ESOMAR Professional Standards Committee and a Client Sounding Board. This initiative is endorsed by the ESOMAR Council. Details of the project, its governance and its background are available in a dedicated area on the ESOMAR site. The project deals with each demographic in turn and will update the material regularly. This recommendation covers working status as a topic.

The context for working status

Working status is a demographic, in the way that it is currently framed, that is particularly outdated in the face of current global trends. Retired populations often work, digital transformation has changed the ways in which people can and do work, people frequently have several jobs with an emerging ‘gig economy’. There remain important differences in the way that people work between gender, country/region and within the sizeable ‘informal economy’ in terms of amounts of time worked.

Within this context, the Demographic working group consulted its Client Sounding Board on their views of the utility of Working Status as a variable. These discussions, together with the practical experience of the workgroup itself, revealed that projects generally use working status in one of three ways; firstly, for the project itself; that is to say that the project is specifically interested in researching people who are working or not working. Secondly, as a ‘proxy’ for time availability to do other things; for example, this variable is sometimes used within the Media industry to determine how much time people have available to consume media. Thirdly, it is frequently used both by Research Operations and by Researchers to ensure that the sample has the correct representation between working, not working and unemployed groups of participants.

The Working Group has also taken into consideration issues around the likelihood of research participants selecting options because it is more desirable to do so, ordering effects, and the fact that those options, which may reflect a participant’s current status, are simply not available.

In current practice, the question is usually a single coded question with four answer options;

- Employed full-time
- Employed part-time
- Unemployed
- Not working and not looking for work

The current breaks allow for the aggregation of full and part-time working into one break of ‘employment’ (net) so that the resultant data can be compared with the relevant national demographics. They are collected separately to satisfy the need to estimate time availability. “Not working and not looking for work” is sometimes expanded to take account of students and retired populations. Practically speaking, as soon as the list of answer options is expanded beyond the first four answers, multi-coding can come into play. You can be a student who works or a working person who is studying. The same goes for those who are retired. Therefore, the question becomes a multi-coded construct, that is to say, you can select as many items as required to match your own status. Adopting this approach then expands the flexibility of what we can collect.

A single coded version of a question which assumes that Students can be classified simply through the question “Not working and not looking for work” will be inaccurate as it ignores the large number of students who work. A multi-coded version where the question clearly states (or implies to a large degree) that it is about work will tend to favour work over being a student or being retired. Whatever the reason for including working status, it is important that the answers are as accurate as possible. Greater accuracy can be achieved by offering a larger number of flexible options that allow participants to denote their current status.

In many cultures, it is deemed socially desirable to be in work rather than not, which again tends to favour the use of work rather than non-working codes.

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2 Internal research from Dynata, Kantar and Netquest, shared with this initiative, has highlighted the large number of students who work.

3 Research by Kantar, comprising over 10,000 interviews across 19 countries, followed up by Dynata research (3,500 interviews in four countries), demonstrated a persistent over-indexing of claimed employment compared to OECD data.
There is strong evidence that order bias may play a role here. An accurate question then needs to be multi-coded and needs to mitigate social desirability bias by masking its intention. This is the approach we have taken.

Our objectives in making these recommendations

To summarise, the objectives of the Demographic working group in making these recommendations are to improve the level of accuracy against the current set of requirements by providing more options which can then be summarised in a number of different ways, and to describe an approach that can be used for regular global panel screening and therefore for multi-country projects which require this variable. Our objective is not to provide a comprehensive and mutually exclusive framework for describing detailed working status criteria within individual countries or to make a detailed assessment of the amount and quality of time availability for non-work activities, as this would not be practical or desirable across the majority of global projects. These distinct objectives, around detailed assessments of populations within Social Market Research or large-scale media projects, would require specific questions tailored to the requirement and are out of scope for this project.

The recommendations then comprise two parts; the first is to give a broad list of possible options for participants, and the second is to define the ways in which these options can be summarised in order to meet the stated objectives for use of working status.

The general recommended approach for the measurement of working status

This general advice applies to all modes of online and offline research.

1. Use a multi-coded question that is neutral as regards the question topic

   Why? Confining the frame of reference to employment will tend to bias the answer towards working.

   Note that all other codes (e.g. homemaker, carer etc.) are not validated or tested and are simply there to mask the intention. Should these be required, then a separate, validated screening question should be employed.

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4 The Dynata research demonstrated an order bias in the countries tested, that is present in most countries to some degree. There is a greater likelihood of selecting “employed full-time” when it is the top answer rather than the fourth. Similarly, there is a greater likelihood to select “not in employment and not looking for work” when it is the top answer rather than the fourth.

5 The Kantar research demonstrated order effects, an overclaim for working status, when working answers were positioned at the top of the list rather than at the bottom.
2. Allow plenty of other non-working statuses and roles as well as non-standard working arrangements

   Why? To overcome social desirability bias (i.e., to position “not working” as a valid and normal response). This will provide the most accurate data.

3. Process the data into the desired construct(s)

   Why? To allow for consistent use across samples and match to national statistics.

   Note that the desired constructs are limited to working status, time availability, employment type, retired and studying/student.

   All other codes (e.g. homemaker, carer etc.) are not validated or tested and are simply there to mask the intention. Should these be required, then a separate, validated screening question should be employed.

4. Consider not asking about working status if this information is already held by the sample provider, is updated regularly, and can be appended to your survey.

   Why? This is in order that respondents are not repeatedly asked for the same information, which leads to respondent friction.

How best to word the Working Status question

“Which of the following describe you?”

**Avoid**: references to work and employment.

What answers should be provided?

1. Studying / retraining / a student
2. Bringing up a family
3. Unpaid full-time carer
4. Homemaker
5. In full-time paid employment
6. In part-time paid employment
7. Self-employed / freelance work / work for myself / running own business
8. Working unpaid
9. Unable to work due to long term sickness or disability
10. In-between jobs / looking for work
11. Doing military or social/community service
12. Retired
13. Pursuing own goals

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"The closest match to OECD data, proven by both the Kantar and Dynata research, was obtained when using a neutral multi-coded question with masking elements, presented in the suggested order."
Note that the words “or social/community” in code 10 should only be included in countries where this is an alternative to compulsory military service. In all other countries, it should read “Doing military service”.

**Notes on the answers**

Separate out “working full-time” and “working part-time”.

*Why?* Workers not in full-time employment should not be left to decide if they classify themselves more as a worker or non-worker. The distinction is required when used as a proxy for time availability.

You can use either “work” or “paid employment”.

*Why?* Either one produces the same results. However, “paid employment” does avoid any connotation that what someone does in the household (for no pay) is not “work”.

Do not specify how many hours constitute “full-time” and “part-time”.

*Why?* This number, where it is a legal definition, differs from country to country and adds an unnecessary level of complexity.

Avoid the word “unemployed”.

*Why?* In some languages, it may be considered pejorative and encourage social desirability bias; if so, use a more value-free alternative like “in-between jobs”.

**Presentation**

In what order should the answers be presented?

In the same order as presented on page 4. Non-working people need to see “their codes” before the more socially desirable codes for working.

If desired, codes 5, 6, 7 and 8 can be bracketed under a cascading drop-down list labelled “Working full- or part-time” at the top level.

**Recommended data outputs/presentation**

This section provides a possible approach in the areas of employment status and time availability using the recommendation on the collection of working status data shown on page 4. There is inevitably some element of subjectivity, but this short section is intended to help to inform thinking on how to tackle the challenges of global consistency, one of the main objectives of this project.
PAID EMPLOYMENT STATUS

• In full-time paid employment (WORKING STATUS = any of 5, 7 or 11)
• In part-time paid employment only (WORKING STATUS = 6 and not 5, 7 or 11)
• Looking for work (WORKING STATUS = 10 and not any of 5, 6, 7 or 11)
• Not working and not looking for work (WORKING STATUS = not any of 5, 6, 7, 10 or 11)

For weighting using employment rate statistics (e.g. OECD), use:

EMPLOYMENT RATE

Employed (WORKING STATUS = any of 5, 6, 7 or 11)
Not employed (WORKING STATUS = not any of 5, 6, 7 or 11)

TIME AVAILABILITY STATUS (note that this is single-coded. This means that respondents can only be in one of these categories to be included).

Note that ESOMAR is well aware of the shortcomings of using working status as a proxy for time availability. In providing this output we are simply reflecting the reality of how it is currently used. We recommend that if time availability is important enough, then it should be asked as a separate, validated question.

• Little time availability (WORKING STATUS = any of 3, 5, 7 or 11)
• Limited time availability (WORKING STATUS = any of 1, 6 or 8 and not any of 3, 5, 7 or 11)
• More time availability (WORKING STATUS = not any of 1,3, 5, 6, 7, 8 or 11)

EMPLOYMENT TYPE

• Self-employment (WORKING STATUS = 7)
• Employed (WORKING STATUS = 5 or 6 or 11 and not 7)

RETIRED

• Yes – total (WORKING STATUS = 12)
• Yes – and in paid employment (WORKING STATUS = 12 and any of 5, 6, 7 or 11)
• Yes – and not in paid employment (WORKING STATUS = 12 and not any of 5, 6, 7 or 11)
• No (WORKING STATUS not = 12)
Industry validation

This recommendation has been prepared by a dedicated working group and validated by the ESOMAR Professional Standards Committee and a Client Sounding Board. For further details on the executives involved, see the ESOMAR site page on the Demographic Best Practice project.

ESOMAR and its Professional Standards Committee would like to thank Pete Cape for his extensive research and work with the Demographic Working Group in drafting this best practice document.

The research that supports these recommendations

Reference data on employment (among 15-64 years olds) can be sourced from the OECD Employment – Employment rate – OECD Data.

No readily available academic research has been found that has investigated this topic. However, the working group has made extensive reference to findings available from the work and 'expertise' of its members.
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