

FOR RELEASE NOVEMBER 12, 2015

The Unique Challenges of Surveying U.S. Latinos

BY *Anna Brown*

**FOR FURTHER INFORMATION
ON THIS REPORT:**

Mark Hugo Lopez, Director, Hispanic Research

Molly Rohal, Communications Manager

Anna Brown, Research Assistant

202.419.4372

www.pewresearch.org

About This Report

This report explores the unique methodological challenges that arise in surveying Hispanic adults in the United States, from designing questionnaires to selecting the survey sample to conducting the interviews to weighting the data.

The report was written by Research Assistant Anna Brown. Editorial guidance was provided by Kyley McGeeney, research methodologist; Scott Keeter, director of survey research; Mark Hugo Lopez, director of Hispanic research; Courtney Kennedy, incoming director of survey research; Claudia Deane, vice president of research; Sara Goo, senior digital editor; and Katie Simmons, associate director of research. Additional research guidance was provided by Shiva Maniam, research assistant; Jocelyn Kiley, associate director of research; and Ana Gonzalez-Barrera, research associate. Eileen Patten, research analyst, number checked the report, and Shannon Greenwood, assistant digital producer, copy edited the report.

Find related reports online at pewresearch.org/methods and pewresearch.org/hispanic.

About Pew Research Center

Pew Research Center is a nonpartisan fact tank that informs the public about the issues, attitudes and trends shaping America and the world. It does not take policy positions. The center conducts public opinion polling, demographic research, content analysis and other data-driven social science research. It studies U.S. politics and policy; journalism and media; internet, science and technology; religion and public life; Hispanic trends; global attitudes and trends; and U.S. social and demographic trends. All of the center's reports are available at www.pewresearch.org. Pew Research Center is a subsidiary of The Pew Charitable Trusts, its primary funder.

© Pew Research Center 2015

A Note on Terminology

The terms “Latino” and “Hispanic” are used interchangeably in this report.

“Cellphone only” includes individuals who have a cellphone but do not live in a household with a landline phone. “Not cellphone only” includes individuals who either have only a landline or who have both a cellphone and a landline.

“Fully bilingual surveys” are those in which the entire interviewing staff responsible for contacting heavily Latino areas is bilingual. “Modified bilingual surveys” are those in which interviewers arrange for a bilingual interviewer to call a Spanish-speaking respondent back.

To measure language proficiency among Hispanics, Pew Research Center asks survey participants in its National Surveys of Latinos to self-assess their ability to carry on a conversation and how well they can read in English and in Spanish. Those who self-assess their proficiency as “very well” in each of these four measures are identified as bilingual. Those who say “very well” only about English are identified as English-dominant, while those who say the same only about Spanish are identified as Spanish-dominant. For more details, see [“A majority of English-speaking Hispanics in the U.S. are bilingual.”](#)

A “multi-generational household” is a household that includes at least two adult generations (for example, parents and adult children ages 25 or older where either can be the household head) or two non-sequential generations (for example, grandparents and grandchildren of any age). For a more detailed definition, see [“In Post-Recession Era, Young Adults Drive Continuing Rise in Multi-Generational Living.”](#)

The Unique Challenges of Surveying U.S. Latinos

BY *Anna Brown*

As the U.S. Hispanic population grows, reaching nearly [57 million in 2015](#) and making up 18% of the nation's population, it is becoming increasingly important to represent Hispanics in surveys of the U.S. population and to understand their opinions and behavior. But surveying Hispanics is complicated for many reasons – language barriers, sampling issues and cultural differences – that are the subject of a growing field of inquiry. This report explores some of the unique challenges currently facing survey researchers in reaching Hispanics and offers considerations on how to meet those challenges based on the research literature and our experiences in fielding the Pew Research Center's National Survey of Latinos.

Designing the Survey Questionnaire: Stress Confidentiality, Translate with Cultural Context in Mind

A respondent's answer to a survey question, or even their decision to participate in the survey at all, is a product of social and cognitive context and may differ across racial and ethnic groups. In fact, [studies](#) have shown that Hispanics are more likely to refuse to participate in surveys, or having agreed to take a survey, more likely to refuse to answer individual questions under some circumstances. This disproportionate refusal rate may in part be driven by a general [suspicion](#) of government or a more specific fear of deportation among subgroups of the U.S. Hispanic population, including unauthorized immigrants. Introductory language at the start of the questionnaire that stresses the random selection of the respondent and confidentiality of responses can help to mitigate this risk, though experience suggests it will not mitigate it entirely.

One other key factor to consider when planning a survey of U.S. Hispanics, [73% of whom](#) report speaking either only Spanish or both Spanish and English at home, is the translation of the survey instrument. Conducting a survey in multiple languages is complicated, but necessary to capture a sample that is representative of the U.S. population. Typically, it is difficult to translate a survey question exactly to capture meaning and nuance. There are [two possible goals](#) when it comes to survey translation. One advocates for translating the words of the question as faithfully and literally as possible so that all respondents will hear the same question, regardless of language. [The other](#), used by Pew Research Center in most cases, strives for equivalence in the meaning of the question – taking cultural differences into account, the goal being to translate the question so that all respondents will understand it in the same way.

Some common terms in English-language surveys are unfamiliar in other cultures or cannot be translated precisely. For example, the word “sympathetic” has no direct Spanish equivalent, but it

is a common English word for soliciting attitudes toward groups of people. At Pew Research Center, we try to avoid the use of “sympathetic” in surveys to eliminate this problem, but there are still instances where this is the best word for the English-language version of a survey question. Another common translation dilemma is the use of the idiomatic phrase “if any” or “if ever” – for example, “How often, if ever, do you attend a gathering with extended family?” In Spanish, this translates to “¿Con qué frecuencia, en caso de hacerlo, asiste a reuniones familiares?” which in English reads: “How often, in case you do, do you attend family gatherings?” The phrase “if ever” does not have a directly equivalent translation in Spanish. This is also an example of translating within a cultural context rather than literally. “Family” in Spanish means extended family by definition, while “extended family” refers to distant relations such as third and fourth cousins. In survey research, small wording changes can have big impacts and the impact of some of these inexact translations is not known. Other cultural issues exist as well – [for example](#), the choice between formal and informal pronouns to address the respondent is not an issue in English, but it must be considered in a Spanish translation because customs about formality and respect differ across Hispanic cultures.

In addition, Hispanics interpret some concepts and question wordings differently than others.¹ For example, [several studies](#) provide evidence that Hispanics conceptualize health in a holistic way. They tend to include spiritual and social well-being as well as medical conditions when rating their own health. The net effect is that Hispanics (and Spanish-speaking Hispanics in particular) rate their health [poorly in comparison](#) with non-Hispanic whites. Yet, paradoxically, Hispanics [score better](#) than non-Hispanic whites on many objective public health measures such as mortality rates and low birth weights, and foreign-born Hispanics, as a group, are healthier than their U.S.-born counterparts.

Other cultural differences affect Hispanics’ survey responses. They are more likely than other Americans to show “[acquiescence bias](#),” meaning they lean toward giving “yes” answers at a disproportionate rate. They are also more likely on average to give responses they perceive as more [socially desirable](#) in response to sensitive questions, including questions about voting habits, ethical decisions and undesirable feelings toward others (this is true to a lesser extent among all Americans).

Finally, because Hispanics are more likely than whites to live in multi-generational households, questions about the household (such as household income) might lead to confusion or different interpretations by survey respondents because of a lack of clarity on household definitions.

¹ The Hispanic community is by no means a homogenous one. These findings refer to the Hispanic community as a whole unless otherwise specified, but there may be considerable diversity by Hispanic origin group, nativity, language and other variables.

Survey Sampling: Cellphone-Only Hispanics Are an Essential Group to Capture

Sample design also plays a role in researchers' ability to conduct a representative survey of Hispanics. For example, Hispanics are the racial/ethnic group **most likely** to live in a cellphone-only household. And those who live in cellphone-only households have a different demographic profile from those who don't.

The 2014 National Survey of Latinos shows that Hispanics who have a cellphone but no landline phone tend to be younger (36% of cellphone-only Hispanics are younger than 30, compared with 19% of those with a landline) and more likely to be U.S. born (43% of cellphone-only Hispanics, compared with 35% of those with a landline).²

Cellphone interviews are **more expensive** to conduct than landline interviews, but they are essential to obtaining a representative sample of Hispanic adults. In the most recent **National Survey of Latinos**, 68% of interviews were conducted on cellphones, producing an unweighted Hispanic sample that is 47% cellphone only, which means that the weights needed to align the estimates with the National Health Interview Survey **cellphone-only benchmark** for Hispanics are not as extreme. By comparison, in Pew Research Center surveys of the general U.S. public today, 35% of interviews are conducted on a landline and **65% on a cellphone** to ensure those with only landlines and only cellphones are represented, as the cellphone-only benchmark is lower for the total population than for Hispanics.

Another aspect of sample design in relation to Hispanics is that since they account for only 15% of the adult population as of 2014, it is very inefficient to use simple random sampling for a

Cellphone-Only Hispanics Are More Likely to be Young, U.S. Born

% of Hispanic adults

	Cellphone only	Not cellphone only
<i>Ages</i>		
18-29	36*	19
30-49	45	40
50-64	15*	23
65 and older	3*	17
<i>Born in ...</i>		
U.S.	43*	35
Puerto Rico	3*	6
Another country	54	59
<i>Primary language</i>		
English-dominant	27	23
Bilingual	40	40
Spanish-dominant	33	37

Note: * indicates that the difference between cellphone only and not cellphone only is statistically significant. "Cellphone only" includes individuals who have a cellphone but do not live in a household with a landline phone. "Not cellphone only" includes individuals who either have only a landline or who have both a cellphone and a landline. The National Survey of Latinos asks Hispanic adults to self-assess their language abilities. Respondents rated their ability to carry on a conversation in Spanish and English and how well they can read a book or newspaper written in Spanish and English.

Source: Pew Research Center's 2014 National Survey of Latinos, Sep 11-Oct 9, 2014 (N=1,520)

PEW RESEARCH CENTER

² In this instance, "U.S. born" refers to those born in the 50 U.S. states or the District of Columbia. If those born on the island of Puerto Rico (who are U.S. citizens at birth) are included among the U.S. born there is no significant difference between those who have a cellphone only and other respondents.

study focused on Hispanics, since the vast majority of households contacted will not include an eligible respondent. To increase the efficiency of reaching a Hispanic respondent, the [National Survey of Latinos](#) employs a national dual-frame random digit dialing sample design that stratifies³ landline numbers based on Spanish surnames for listed landlines and for unlisted landlines into high- and low-incidence strata based on the estimated concentration of Hispanics within a certain area code and exchange.⁴ It also stratifies cellphone numbers into strata with high, medium and low incidences of Hispanics. To ensure coverage, both low-incidence strata are drawn from previously interviewed respondents who indicated that they were Hispanic or Latino on a national weekly omnibus survey conducted by SSRS. Phone numbers from the surname strata and exchanges with higher Hispanic concentration are oversampled, which means they're included in the sample at a higher rate than is their actual incidence among all phone numbers. This oversampling is then accounted for with statistical weights once the data are collected.

Another complication in sampling Hispanics concerns household size and structure. Hispanics tend to live in larger households, and about a quarter of Hispanics live in a multi-generational household. In telephone surveys conducted on a landline, phone interviewers must conduct “within household selection,” meaning they have to randomly select one eligible adult in the household to take the survey. If there are many adults in the household or multiple households living within one housing unit, this can make the within-household selection difficult and/or inaccurate depending on the method used to select one adult to interview.

Interviewing: Two Approaches Capture Different Profiles of the Population

Data quality in telephone surveys of Latinos is also affected by the linguistic capabilities of the interviewing staff. Pew Research Center uses two different approaches to interviewing a multilingual population in the U.S. In some surveys, only bilingual interviewers are used to call potential respondents who live in an area with a high share of Hispanics (Pew Research’s annual [National Survey of Latinos](#) uses this strategy, called “fully bilingual”). These bilingual interviewers conduct the survey in either English or Spanish, or sometimes a mixture of both, according to the survey respondent’s preference. An alternative, more common method is the “modified bilingual” method where most interviewers speak only English. When an English-speaking interviewer encounters a respondent who prefers to be interviewed in Spanish, the English-speaking interviewer will arrange for a bilingual interviewer to call the survey respondent back.

³ Stratified sampling is a method of sampling that involves separating members of the population into subgroups, or strata, based on distinct characteristics of interest prior to sampling.

⁴ It is important to note that the existence of a surname stratum does not mean the survey was a surname sample design. The sample is RDD, with the randomly selected telephone numbers divided by whether or not they were found to be associated with a Spanish surname. This was done simply to increase the number of strata and to ease administration by allowing for more effective assignment of interviewers and labor hours.

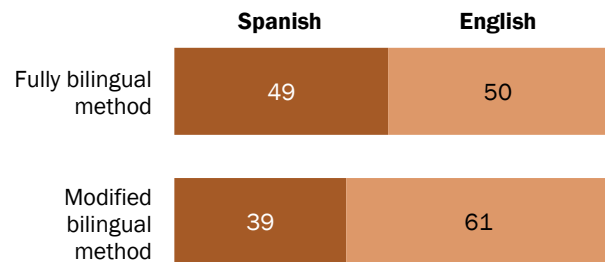
These two approaches result in different profiles of the Hispanic population. For example, an analysis of Pew Research Center data gathered with each method shows that the fully bilingual method results in more interviews with Spanish-dominant Hispanics than in the modified bilingual method. In addition, it shows that the fully bilingual method obtains more interviews with foreign-born Hispanics who are more likely to be Spanish speakers.⁵

Even though these two methods produce samples that are different on some language and nativity measures, once weighted, a comparison of Hispanics interviewed by the two methods finds few differences in public opinion on topics such as gay marriage and abortion and other basic demographic measures. For example, one fully bilingual [Pew Research survey](#) of Hispanic adults in 2013 finds that 46% said they favor or strongly favor allowing gays and lesbians to marry legally. By comparison, a similar 49% of Hispanic adults said the same in one modified bilingual survey of the general U.S. population conducted around the same time.⁶ This weighting is essential to account for the disparity in public opinion between foreign-born and U.S.-born Hispanics, discussed in more detail in the next section.

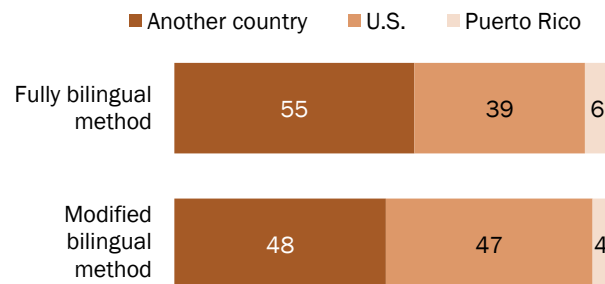
A fully bilingual interviewing staff is expensive, but considered necessary for surveys focused on the nation's Hispanic population. Pew

Language and Nativity Differences By Interviewing Method

% of Hispanic adults who responded to the interview in ... by interviewing method



% of Hispanic adults saying they were born in ... by interviewing method



Note: Data are unweighted. Fully bilingual surveys are those in which the entire interviewing staff responsible for contacting heavily Latino areas is bilingual. Modified bilingual surveys are those in which interviewers arrange for a bilingual interviewer to call a Spanish-speaking respondent back. For the fully bilingual method, "Spanish" includes those who completed the interview all or mostly in Spanish. "English" includes those who completed the interview all or mostly in English.

Source: For the fully bilingual method, Pew Research Center's 2014 National Survey of Latinos, Sep 11-Oct 9, 2014 (N=1,520). For the modified bilingual method, Pew Research Center aggregated monthly surveys conducted September-November 2014 (n=627 Hispanics total).

PEW RESEARCH CENTER

⁵ The two surveys used to compare the fully bilingual and modified bilingual methods are not identical aside from the interviewing method. Different field periods, different sample designs, different survey houses and sampling error may also contribute to the differences found between the two.

⁶ Support for same-sex marriage has been [rising among Hispanics](#) since 2006.

Research Center uses this method for its annual [National Survey of Latinos](#) and also did so for its 2015 [Religious Landscape Survey](#). However, a fully-bilingual interviewing staff is usually not considered necessary for surveys in which Spanish speakers are only a small share of the target population (e.g., all U.S. adults). In a typical Pew Research general population survey, just 5.3% of all respondents completed their survey in Spanish.

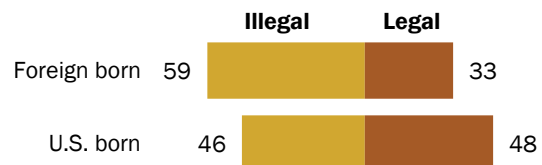
Weighting: Nativity is a Key Variable

The next consideration is how to weight Hispanic survey data. In surveys of the general public, Pew Research Center asks only Hispanics if they were born in the U.S., Puerto Rico or another country and weights the Hispanic respondents based on their responses (including Puerto Rico as U.S. born) in order to adequately represent foreign-born and Spanish-speaking Hispanics in the results. In surveys of the Hispanic population, such as the National Survey of Latinos, data are weighted by more detailed variables, including the number of years foreign-born Hispanics have lived in the U.S. and whether or not they are Mexican.

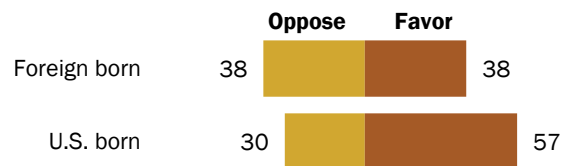
Foreign-born and U.S.-born Hispanics show significant differences of opinion on some key issues – and not necessarily consistently on one side of the ideological spectrum across the issues. For example, foreign-born Hispanics tend to be more conservative on abortion and same-sex marriage. A majority of the foreign born say abortion should be illegal in all or most cases (59%), while the U.S. born are more evenly split (46% say it should be illegal). And on same-sex marriage, the foreign born are evenly split on the matter (38% oppose it and 38% favor it), but a clear majority of the U.S. born (57%) are in favor of allowing gays and lesbians to marry legally.

Foreign-born and U.S.-born Hispanics Disagree on Key Issues

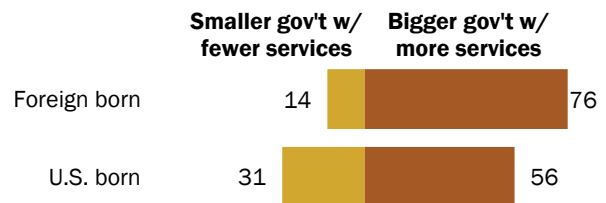
*% of Hispanics saying **abortion** should be ... in all or most cases*



*% of Hispanics saying they ... allowing **gays and lesbians to marry** legally*



% of Hispanics saying if they had to choose, they would rather have ...



Note: Volunteered responses of "Depends" and "Don't know/Refused" are not shown. U.S. born includes those born in Puerto Rico.

Source: Pew Research Center's 2013 National Survey of Latinos, May 24-July 28, 2013 (N=5,103)

PEW RESEARCH CENTER

Yet when asked whether they would prefer a smaller government that offers fewer services or a bigger government with more services, while both immigrants and the U.S. born lean toward a bigger government, immigrants are more likely to prefer it by about 20-percentage points (76% vs. 56%).

References

- Aday, Lu Ann, Grace Y. Chiu and Ronald Andersen. 1980. "Methodological Issues in Health Care Surveys Of the Spanish Heritage Population." *American Journal of Public Health*, Vol 70(4). April. <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC1619379/>
- Blumberg, Stephen J. and Julian V. Luke. 2015. "Wireless Substitution: Early Release of Estimates From the National Health Interview Survey, July-December 2014." Atlanta: Centers for Disease Control and Prevention, June. <http://www.cdc.gov/nchs/data/nhis/earlyrelease/wireless201506.pdf>
- Escarce, José J., Leo S. Morales and Rubén G. Rumbaut. 2006. *Hispanics and the Future of America*. Washington, D.C.: National Academies Press. <http://www.ncbi.nlm.nih.gov/books/NBK19899/>
- Evans, Brian, Rosanna Quiroz, Leslie Athey, Joseph McMichael, Vicky Albright, Michelle O'Hegarty and Ralph S. Caraballo. 2008. "Customizing Survey Methods to the Target Population: Innovative Approaches to Improving Response Rates and Data Quality among Hispanics." https://www.rti.org/pubs/evans_aapor08_paper.pdf
- Franzini, L. and M.E. Fernandez-Esquer. 2006. "The association of subjective social status and health in low-income Mexican-origin individuals in Texas." *Social Science & Medicine*, Vol 63(3). August. <http://www.ncbi.nlm.nih.gov/pubmed/16580107>
- Fry, Richard and Jeffrey S. Passel. 2014. "In Post-Recession Era, Young Adults Drive Continuing Rise in Multi-Generational Living." Washington, D.C.: Pew Research Center, July. <http://www.pewsocialtrends.org/2014/07/17/in-post-recession-era-young-adults-drive-continuing-rise-in-multi-generational-living/>
- Harkness, Janet A. and Alicia Schoua-Glusberg. 1998. "Questionnaires in Translation." January. http://isites.harvard.edu/fs/docs/icb.topic506406.files/znspez3_04_Harkness_Glusberg.pdf
- Hopwood, Christopher J., Claudia G. Flato, Suman Ambwani, Beth H. Garland and Leslie C. Morey. 2009. "A Comparison of Latino and Anglo Socially Desirable Responding." *Journal of Clinical Psychology*, Vol 65(7). July. <http://www.ncbi.nlm.nih.gov/pubmed/19388057>

- Kleiner, Brian, Yuling Pan and Jerelyn Bouic. 2009. "The Impact of Instructions on Survey Translation: An Experimental Study." *Survey Research Methods*, Vol 3(3).
<https://ojs.ub.uni-konstanz.de/srm/article/view/1563>
- Krogstad, Jens Manuel and Ana Gonzalez-Barrera. 2015. "A majority of English-speaking Hispanics in the U.S. are bilingual." Washington, D.C.: Pew Research Center, March.
<http://www.pewresearch.org/fact-tank/2015/03/24/a-majority-of-english-speaking-hispanics-in-the-u-s-are-bilingual/>
- Krogstad, Jens Manuel, Renee Stepler and Mark Hugo Lopez. 2015. "English Proficiency on the Rise Among Latinos: U.S. Born Driving Language Changes." May.
<http://www.pewhispanic.org/2015/05/12/english-proficiency-on-the-rise-among-latinos/>
- Lee, Sunghee, Norbert Schwarz and Leanne Streja Goldstein. 2014. "Culture-Sensitive Question Order Effects of Self-Rated Health Between Older Hispanic and Non-Hispanic Adults in the United States." *Journal of Aging and Health*, Vol 26(5).
<http://www.ncbi.nlm.nih.gov/pubmed/24812265>
- LeVine, Elaine and Juan N. Franco. 1981. "A reassessment of self-disclosure patterns among Anglo-Americans and Hispanics." *Journal of Counseling Psychology*, Vol 28(6). November. <http://psycnet.apa.org/index.cfm?fa=buy.optionToBuy&id=1982-03540-001>
- Lopez, Mark Hugo and Danielle Cuddington. 2013. "Latinos' changing views of same-sex marriage." Washington, D.C.: Pew Research Center, June.
<http://www.pewresearch.org/fact-tank/2013/06/19/latinos-changing-views-of-same-sex-marriage/>
- Lopez, Mark Hugo, Ana Gonzalez-Barrera and Jens Manuel Krogstad. 2014. "Latino Support for Democrats Falls, but Democratic Advantage Remains." Washington, D.C.: Pew Research Center, October. <http://www.pewhispanic.org/2014/10/29/latino-support-for-democrats-falls-but-democratic-advantage-remains/>
- McCarthy, M., E. Ruiz, B. Gale, C. Karam and N. Moore. 2004. "The meaning of health: perspectives of Anglo and Latino older women." *Health Care for Women International*, Vol 25(10). December. <http://www.ncbi.nlm.nih.gov/pubmed/15513801>

- Pew Research Center. 2014. "The Shifting Religious Identity of Latinos in the United States." Washington, D.C.: May. <http://www.pewforum.org/2014/05/07/the-shifting-religious-identity-of-latinos-in-the-united-states/>
- Pew Research Center. 2015. "America's Changing Religious Landscape: Christians Decline Sharply as Share of Population; Unaffiliated and Other Faiths Continue to Grow." Washington, D.C.: May. <http://www.pewforum.org/2015/05/12/americas-changing-religious-landscape/>
- Pew Research Center. 2015. "Modern Immigration Wave Brings 59 Million to U.S., Driving Population Growth and Change Through 2065: Views of Immigration's Impact on U.S. Society Mixed." Washington, D.C.: September. <http://www.pewhispanic.org/2015/09/28/modern-immigration-wave-brings-59-million-to-u-s-driving-population-growth-and-change-through-2065/>
- Pew Research Center. "Cell Phone Surveys." Washington, D.C. Accessed online at <http://www.people-press.org/methodology/collecting-survey-data/cell-phone-surveys/> on October 22, 2015.
- Pew Research Center. "Sampling." Washington, D.C. Accessed online at <http://www.pewresearch.org/methodology/u-s-survey-research/sampling/> on October 22, 2015.
- Ponce, Ninez A., Shana Alex Lavarreda, Wei Yen, E. Richard Brown, Charles DiSogra and Delight E. Satter. 2004. "The California Health Interview Survey 2001: Translation of a Major Survey for California's Multiethnic Population." *Public Health Reports*, Vol 119. July-August. <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC1497648/pdf/15219795.pdf>
- Ruggles, Steven, Katie Genadek, Ronald Goeken, Josiah Grover and Matthew Sobek. *Integrated Public Use Microdata Series: Version 6.0* [Machine-readable database]. Minneapolis: University of Minnesota, 2015. <https://usa.ipums.org/usa/>
- Taylor, Paul, Ana Gonzalez-Barrera, Jeffrey S. Passel and Mark Hugo Lopez. 2012. "An Awakened Giant: The Hispanic Electorate is Likely to Double by 2030: Aging, Naturalization and Immigration Will Drive Growth." Washington, D.C.: Pew Research Center, November. <http://www.pewhispanic.org/2012/11/14/an-awakened-giant-the-hispanic-electorate-is-likely-to-double-by-2030/>