

Werkplaats van het sociaal onderzoek

The indirect questionnaire as a tool for sociological research*)

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In preparing any kind of sociological investigation, we have to resolve three main questions, which are closely connected with each other:

1. It is necessary to determine what facts about what social objects are to be studied. This finds its outward expression e.g. in the questionnaire.
2. It is of paramount importance to secure a scientific representativeness of the data which are to be collected. As a rule, in so far as most investigations are not exhaustive, this is achieved best with the aid of the stochastic representative method.
3. It is also necessary to secure the authenticity of the data. The question about the representativeness and that about the authenticity of the data are not to be confused, for they are qualitatively different questions. The degree of representativeness depends on the quantity of units in the general totality which will be investigated, as well as on the way in which each one of them has been selected. In this the accuracy of registration is presupposed, and authenticity depends upon how accurately with respect to reality, the questions contained in the questionnaire have been answered. Authenticity is adequate registration.

It is obvious that even the most successful inference would be futile if registration is incorrect. It is here that the sociologist should display his skill and work out methods and concrete procedures for registering the data, which would secure a maximum objectivity.

The present paper is devoted to a concrete method of registration which has begun to be used by Bulgarian sociologists. We have called this method "indirect questionnaire". Its characteristic feature is that the questionnaire is filled out not by the investigated person, but by the investigators. A necessary prerequisite in this case is that the investigator should be well-acquainted with the investigated person's life, work, family, etc. Besides, before filling out the questionnaire the research worker should talk about the investigated person with at least two or three people who know him. In the course of these conversations the research worker specifies his impressions of the investigated person and learns a few things which he may not have known hitherto about him. If necessary, the research worker checks documents in state

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institutions, in the plant or factory where the investigated person works, and so on. During the investigation the research worker can make partial observations on the conduct of the investigated person. And, finally, the research worker can have a talk with the investigated person himself on some questions without of course, informing him about the investigation.

As can be seen, the indirect questionnaire differs from the different forms of direct questionnaire and from the interview, which are generally resorted to in sociological research. Outwardly, the indirect questionnaire differs from the direct questionnaire above all in that in the latter the questionnaire is filled out by the investigated person and from the interview it differs in that in it the questionnaire is filled out by the research worker in the course and on the basis of the conversation with the investigated person. In the direct questionnaire the source of information is only the investigated person. As a result, in the direct questionnaire we deal with the opinion and evaluation of the investigated person with regard to the questions posed. In the interview, we deal with the opinion and evaluation of the research worker, which however, are directly based on the course of the conversation and the statements made by the investigated person; what is more, the research worker does not have to know the investigated person from beforehand and usually does not know him.

In the indirect questionnaire the sources of information are incomparably more diverse. As has been said, they also include the research worker's personal impressions and observations; information, opinions and evaluations by other persons from the entourage of the investigated person about his conduct, thoughts, reactions, work and social activities, etc., as well as different kinds of documents containing objective facts about the investigated person and the investigator's conversation with the latter. Obviously, in the indirect questionnaire the research worker is the one who gives the final answer and evaluation by filling out the questionnaire. But as can be seen this takes place on a very broad and manysided basis which reduces to a minimum the possibility of deviating from the truth and of subjectivism.

The method of indirect questionnaire differs from that of observation. In observation the research worker purposefully considers definite actions of the investigated person, under circumstances and for a term selected from beforehand. In the indirect questionnaire the research worker and the persons who are questioned have observed the investigated person directly and many times in situations in real life in which they were actual participants. These observations were performed by them naturally and without knowing that later on they would have to give information about the investigated person, and not in their capacity of research workers. Precisely for this reason they have come to know the investigated person in his real manifestations and peculiarities, without disguising and distorting his real thoughts, motives and conduct.

Insofar as in indirect investigation among the other sources of information observation is also included, which observation the research worker can eventually make during the investigation itself, it is only an element subordinated to the method of indirect questionnaire.

In brief, in indirect questionnaire the research worker does not perform a merely technical procedure, but is to a considerable degree a sort of a research engineer. In

order to answer the questions correctly and precisely, he makes a number of checks, using, as was said, various sources of information and procedures.

The method of indirect questionnaire was worked out and applied in the preparation and implementation of the sociological investigation of the religiousness of the Bulgarian population in 1962. Preliminary tests showed that people readily and quite precisely gave information their acquaintances, but found it difficult to answer certain questions about themselves. This induced the organizers of the sociological investigation of religiousness under the guidance of Professor Zhivko Oshavkov to look for another concrete method of registration, different from those hitherto traditionally applied in sociological research.¹⁾

For a second time the method of indirect questionnaire was used in the sociological investigation of youth in Sofia district in 1966.

Of course, objections can be raised against the use of the method of indirect questionnaire, especially when it is a question of investigating forms of people's consciousness with its aid. Some people maintain that the people themselves can best testify about their own consciousness. Let us try to answer this objection on the basis of the experience gained from the sociological investigation of religiousness in Bulgaria. The said objection is valid only if it is a question of investigating the self-consciousness of people, i.e. of what they think about themselves. However, in this case we were interested in the question whether people believed in God and to what extent. This fact could also be ascertained in another way. For instance, people's religiousness is reflected in their mentality, their world outlook and conduct, and is manifested in their participation in religious rituals. In general, if certain views including religious views do not find an outward manifestation in people's conduct and in their speech, they cannot become a social fact and remain irrelevant to society. That is why, when the research worker is well acquainted with the investigated person, with his family and environment, relatives and friends, when he takes into consideration his conduct under different circumstances and knows the opinion about him of others from the social context of the investigated person; when he resorts in case of need to checks from documents and to conversations with the investigated person himself — the research worker can with great accuracy establish whether and to what extent the investigated person is a believer.

This is especially true of small settlements — villages and small towns, where people have known each other well in the course of long years. But the method of indirect investigation can as a rule be applied also in big cities. In Bulgaria its application is facilitated by a specific fact in our social development. We have in mind the fact that as early as the period of antifascist struggle there existed in our country the mass socio-political organization of the Fatherland Front. Most of the grown up people are members of it. By taking part in the various undertakings of the Fatherland Front's local organizations in villages and city wards, people come to know each other well. The Fatherland Front activists get thoroughly acquainted with the people within the

¹⁾ For greater details concerning the sociological investigation of the religiousness of the Bulgarian population see Zhivko Oshavkov.: *Les résultats d'une étude sociologique de la religiosité en Bulgarie*, *Revue française de sociologie*, VII, 1966.

territory of their local Fatherland Front organization, and it is from among them that we select a great number of our investigations. Evidently the specific peculiarities of Bulgaria's social development in connexion with the existence of the mass socio-political organization of the Fatherland Front is a favourable prerequisite for the utilization of the method of indirect questionnaire.

Yet another objection can be raised against the use of the method of indirect questionnaire. It can be maintained, for instance, that there is a danger for the investigators of taking a biased attitude toward the investigated person. This objection could be answered as follows: according to us, there is no reason why we should believe in the sincerity of the investigated persons, and not believe in the sincerity of the research workers. We choose our investigators mainly from among school-teachers and pensioners on the basis of two requirements: that they have a secondary or university education and organizational experience, and that they have the reputation of honest men of principle. A verification of the results of the investigation of religiousness made in different ways, show that with only very few exceptions the investigators have supplied absolutely objective information and evaluations. But even if we assume that not only in the investigated persons but also in the investigators there was a certain amount of subjectivism while filling out the questionnaires, this would not diminish the scientific value of indirect questionnaire because in this case an additional fact is of great importance. It can be positively asserted that the subjectivism of the investigated persons would manifest itself chiefly if not exclusively in one direction — in underestimating their personal shortcomings and in overestimating their good qualities. At the same time subjectivism of the investigators, insofar as it existed at all, would manifest itself in two opposite directions — some investigators would to a certain degree underestimate the bad and overestimate the good qualities of the investigated persons, while the others would do the opposite. Hence, the changes of a reciprocal counterbalancing of the deviations from the truth in the statistical mean are greater in indirect questionnaire.

A proof of the absolute fitness and high scientific effectiveness of the method of indirect questionnaire can be found in a comparison between the data obtained through it and those obtained in the direct anonymous questionnaire of the religiousness of the Bulgarian population. In that investigation the basic information about the religiousness of the investigated persons was collected by means of indirect questionnaires.

A total of 42,664 persons were investigated. But in order to verify the results and check the possibilities of the different kinds of questionnaire direct and indirect — at the same time and among the same investigated people a direct anonymous questionnaire was also carried out on three control questions. As many as 20,675 persons took part in it, and the results were as follows:

	Indirect Questionnaire	Direct Questionnaire
	in %	
Religious	35,51	33,06
Not religious	64,44	62,12
Not indicated	0,05	4,82
Total:	100,00	100,00

As can be seen, the differences in the results of the indirect and direct investigations are insignificant — about 2 percent. The main reason for these differences is to be sought in certain violations of the demands of the stochastic representative method in indirect questionnaire. We have in mind the fact that the direct questionnaire was performed only in those settlements, where at least 3/4 of the investigated persons from the same settlement could be gathered together. But owing to sickness or absence from the settlement of some of the investigated persons at the time of the investigation and to various other reasons, this could not be done everywhere. Moreover almost in no place where the direct questionnaire was carried out, all investigated persons of the same settlement were present. It is for this reason that participation of investigated persons in the direct questionnaire by settlements and by their number in the individual settlements is characterised by a certain irregularity from the view-point of the demand of the stochastic representative method — which goes to explain the above difference in indirect and direct questionnaire. Proceeding from the experience of Bulgarian sociologists and in view of the characteristic features of indirect questionnaire we should like, in conclusion, to make the following remarks:

First. The method of indirect questionnaire is most effective in the study of factual matters, including facts of consciousness which have found an outward expression, as well as in probing public opinion on certain questions.

Second. The use of indirect questionnaire is particularly effective in cases when the investigation programme contains questions which offer opportunities for negative evaluation of the thinking and conduct of the investigated persons.

Third. An exceptionally important advantage of the method of indirect questionnaire lies in the fact that it makes possible the investigation of persons which have from beforehand been selected according to a certain criterion. In it, the presence of the investigated persons in a given settlement during the investigation is not necessary. Thus, the method of indirect questionnaire offers a possibility for the application of the stochastic representative method and for achieving representativeness with a maximum probability.

Fourth. The method of indirect questionnaire is most easily applied in comparatively small settlements where people have known each other well for a long time. But although with greater difficulty, it can effectively be applied also in big settlements within different organizations such as industrial trade unions, cultural, educational, socio-political, sports, and other organizations, where people know each other equally well.

Fifth. The method of indirect questionnaire synthesizes in a peculiar way the characteristic features and possibilities of several other methods and is based on diverse sources of information. That is why, according to us, it offers ample opportunities for attaining a maximum of objectivity. We therefore think that the importance of the direct questionnaire and the interview ought not to be exaggerated in sociological investigations to a degree as is the case in many studies. The method of indirect questionnaire ought to be included among the methods of sociological investigation as a method which in many cases will be the more effective.