

Digitalization and Financial Awareness: Designing and Running a Sample Survey

§ Name of instructor

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§ Short description

This lesson covers the design of a sample survey, including questionnaire development, sampling methods, data collection, and quality checks. The lesson includes an example from the Bank of Italy surveys and a hands-on exercise session.

§ Schedule

1. Theory of sample survey design:

- Questionnaire Development: wording, length, addressing bias, pretesting questions.
- Sampling: simple random sample, stratified random sample, cluster sample, quota sampling.
- Collecting Data: survey modes, piloting, quality checks.
- Weighting and Estimators: post-stratification and raking, mean and variance estimators.

2. Example: Bank of Italy IAFG Survey

3. Hands-on exercise

§ Background

Groves, RM, Fowler, FJ, Couper, MP, Lepkowski, JM, Singer, E and Tourangeau, R (2009) Survey Methodology (2nd edition). Wiley Series in Survey Methodology, Wiley.

Marinucci, M, Stacchini, M and Travaglino, F (2024), Surveys on Financial Literacy and Digital Financial Skills in Italy: Young Adults. Statistics, Bank of Italy.

Bank of Italy (2024), Surveys on Financial Literacy and Digital Financial Skills in Italy: Young Adults. Methods and Sources: Methodological Notes, Statistics, Bank of Italy. [Bank of Italy - Surveys on Financial Literacy and Digital Financial Skills in Italy: Young Adults - 2023 \(bancaditalia.it\)](https://www.bancaditalia.it/en/surveys/financial-literacy-and-digital-financial-skills-in-italy-young-adults-2023)

§ Facilities Required

- Software: R, open source, with the R package ... installed

- Course Material. All course materials, including the data and R scripts for the examples, will be made available for course participants.

[Bank of Italy - Financial Literacy of Young Adults in Italy \(bancaditalia.it\)](https://www.bancaditalia.it/en/surveys/financial-literacy-and-digital-financial-skills-in-italy-young-adults-2023)