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Tasks and Strategy Use: Empirical Implications for Questionnaire Studies

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1. Introduction

The use of strategies has been considered to be one of the important factors for successful language learning. Research in this area started in the mid 1970's. Since then, a large volume of studies have been conducted, focusing especially on i) the identification and classification of strategies, ii) the variables affecting strategy use, iii) the effects of strategy use on language learning, and iv) the development of strategy training methods (see, for example, Oxford, 1989; Takeuchi, 1991; Oxford, 1990, 1996; Cohen, 1998, for review).

Table 1. Data Collection Methods

Method	Advantage	Disadvantage
Oral Interviews	<ul style="list-style-type: none"> - the questioning for data collection can be controlled - able to develop detailed case studies with small number of subjects 	<ul style="list-style-type: none"> - contains simplistic data without any opportunity to elaborate on answers - the subjects may report less accurate data - a single case study cannot generalize the findings
Questionnaires	<ul style="list-style-type: none"> - the questioning for data collection can be controlled - able to generate and test hypotheses with large number of subjects - easy to administer and the data collected is amenable to statistical analysis 	<ul style="list-style-type: none"> - contains simplistic data without any opportunity to elaborate on answers - the subjects may report less accurate data - the results may not transfer well from one setting to another, especially in different cultures
Observation	<ul style="list-style-type: none"> - can be used as an aid of the verbal report data - the collected data are more objective than that provided solely by learners 	<ul style="list-style-type: none"> - unable to describe internal or mentalistic strategies
Verbal Report	<ul style="list-style-type: none"> - reveals in detail the cognitive events 	<ul style="list-style-type: none"> - too qualitative - may interfere with the actual thought processes
Diaries and Dialog Journals	<ul style="list-style-type: none"> - able to find out what is significant to learners 	<ul style="list-style-type: none"> - relevant data may not be collected - the data may not suggest or support any hypotheses regarding language strategies - hard to collect an appropriate data

<p style="text-align: center;">Recollective Studies</p>	<ul style="list-style-type: none"> - data can be more objective than that gathered by verbal report because of the learners' distance from the experience - an overall summary of learning experiences can be provided without small details 	<ul style="list-style-type: none"> - memory of learning experience tend to be deteriorated /distorted
<p style="text-align: center;">Computer Tracking</p>	<ul style="list-style-type: none"> - eliminates the problem of data distortion through human inaccuracy or unawareness 	<ul style="list-style-type: none"> - the data is only related to the strategy of concrete manipulation of the computer software - limits the types of data collected (difficult to collect data from listening or speaking tasks)

(based on Cohen, 1998; Takeuchi, 1991)

In these studies, the data analyzed have been gathered through various collection methods. Cohen (1998) and Takeuchi (1991) categorized the data collection methods used so far, and summarized the advantages and disadvantages of each method (Table 1).

Among these research methods, questionnaires have been utilized most often (see Oxford and Burry-Stock, 1995; Oxford, 1996; Cohen, 1998 for review). In this method, subjects are given a list of language learning strategies described in non-technical terms, and are asked to write, one by one, the degree of their use in their language learning activities. In answering, a Likert-type frequency scale of zero (never) to four (whenever possible) is often used. The Strategy Inventory for Language Learning (Oxford, 1990) is one of the most famous examples of questionnaires.

In most cases, questionnaires have been given without any attached tasks. Cohen (1998), however, argues that in that situation, subjects may tend to become less certain about their actual strategy behavior. He also suggests that learners may overestimate or underestimate the frequency of strategy use. So, it might be possible that appropriate data cannot be obtained unless the subjects are engaged in the actual tasks to do before answering a questionnaire. To ascertain Cohen's contention, we conducted the following study.

2. Purposes

The purposes of this study are: (1) to find whether the data collected through a questionnaire is affected by the presence or absence of the actual tasks to do; (2) to find whether the data collected through a questionnaire are affected by the difficulty of the tasks to complete.

3. Method

3.1 Subjects

The subjects of this study were 192 university-level learners studying English as a foreign language. Ninety-seven of them were male engineering-majors, while the rest were female nursing school students. Their ages ranged from 18 to 22. No subject had an experience to live overseas. With regard to their English proficiency, the engineering-

major students were at “lower-intermediate” level, whereas the nursing school students were considered to be at “false-beginner” level. We named the former group “Higher Group” (HG), and the latter “Lower Group” (LG). These two groups were confirmed to be different in terms of English proficiency by a cloze test (the HG: $M= 7.29$, $SD= 2.98$, the LG: $M= 5.82$, $SD= 3.36$; $t= 3.21$ $p= .002$).¹ Since the difference in proficiency level is regarded as one of the variables affecting strategy use (Chamot and Kupper, 1989; Reiss, 1981, among others), their data was analyzed separately.

3.2 Procedure

The data on students’ strategy use were collected for three different conditions by using a questionnaire which will be explained in the next section. For the first condition, the subjects, in both the HG and the LG groups, were given the questionnaire only, without any task to do. For the second and third conditions, the subjects were given a reading task to do (i.e., an approximately 300-word text and comprehension questions). Then the subjects were asked to fill out the questionnaire based on the strategy use in the reading task. The only difference between the second and the third conditions was the difficulty of the task. The text in the second condition was easier than that in the third condition. Approximately 20 minutes were allocated for the task. Every subject finished the task within the time limit.

The second data collection was given two weeks after the first one, and the last was one month after the second. The order of data collection was the same in both groups: first, the questionnaire with no text (NT) attached, second, the questionnaire with the easier text (ET) attached, and, third, the questionnaire with the more difficult text (DT) attached.

3.3 Task

Two reading texts were selected for this study. Five comprehension questions were attached to each text. The ET and the DT had the same topic (i.e., “cross-cultural understanding”) so that the text familiarity and background knowledge would not affect the results. Readability for the ET was 75 and that for the DT was 49 on Flesch Reading Ease scale.² We, thus, can say that these two reading texts were different only in terms of their difficulty.

3.4 Questionnaire

For our data collection, a self-report questionnaire for EFL reading was used (see Appendix). It was developed by the authors, based on learning experiences and previous research (Kimura, 1998; LLA Language Learning Strategy Research Group, 1998). The questionnaire was revised several times to make it more valid and reliable. The reliability of the completed version was satisfactorily high at .86 on Cronbach alpha. It consisted of 33 items, each of which represents distinct reading strategies. In this questionnaire, the subjects were asked to indicate, one by one, the degree of their strategy use in reading, answering on a frequency-scale from one to five. One meant “never”, while five indicated

“always” on this scale. In the ET and the DT conditions, one extra item (Strategy 34) was added. The strategy described in this item was valid only when a text was present.

3.5 Analysis

The reported frequency of each strategy was compared among the three conditions by a statistical test of ANOVA (Analysis of Variance) with repeated measures. As a post-hoc test, LSD (Least Significant Difference) was administered only when we obtained a significant figure in the ANOVA analysis. These statistical analyses were carried out by using STATISTICA Ver. 5.0.

4. Results and Interpretations

Research Question 1: Are the data collected through a questionnaire affected by the presence or absence of the actual tasks to do?

The descriptive statistics for the two groups (i.e., the HG and the LG) are shown in the Tables 2a and 2b below. In both tables, the mean scores in the NT condition were higher than those of the other two conditions (the HG: $F = 14.78$, $p < .000$; the LG: $F = 13.75$, $p < .000$, see also Tables 3a and 3b for post-hoc tests). In both the HG and the LG, the post-hoc tests did not indicate any significant difference between the mean score of the ET condition and that of the DT condition. These results indicated that, in both groups, the subjects tended to report higher frequency of strategy use in the NT condition than in the ET and the DT conditions.

Table 2a. Descriptive Statistics for the HG

	M	SD	Max.	Min.
NT (No Text)	3.02	0.35	3.82	1.91
ET (Easier Text)	2.80	0.47	8.88	1.03
DT (more Difficult Text)	2.87	0.44	4.00	1.36

Table 2b. Descriptive Statistics for the LG

	M	SD	Max.	Min.
NT (No Text)	3.10	0.42	4.24	1.76
ET (Easier Text)	2.94	0.54	4.39	1.18
DT (more Difficult Text)	2.90	0.44	4.12	1.97

Table 3a. The Post-hoc Tests for the HG

Comparison	p
NT vs. ET	< .000
NT vs. DT	< .000
ET vs. DT	n.s.

Table 3b. The Post-hoc Tests for the LG

Comparison	p
NT vs. ET	< .000
NT vs. DT	< .000
ET vs. DT	n.s.

Each strategy in the questionnaire was compared between the NT and the ET, and the NT and the DT conditions, in terms of the frequency of use. Tables 4a and 4b present the number of strategies which showed a significant difference. Out of 33 strategies, the subjects of the HG reported that they used 14 strategies (over 40%) more frequently in the NT condition than in the ET condition. Also comparing the NT and the DT conditions, the HG reported more frequent strategy use in the NT condition in 10 strategies (approximately 30%). Moreover, out of the 10 and 14 strategies, seven were the same strategies. (See Table 4a). The subjects of the LG also showed a similar tendency and percentage: they employed about 30% of the strategies in the questionnaire more frequently in the NT condition. Both the LG and the HG, on the other hand, had only a few strategies which showed less frequent use in the NT than either the ET or the DT condition (the HG: two strategies; the LG: one strategy). Therefore, both the HG and the LG groups indicated more frequent use of strategies in the NT condition than in the two conditions which had an actual text to read.

Table 4a. NT vs. ET/DT for the HG

Comparison	NT >		NT <	
	ET	DT	ET	DT
Strategy	Strategy 1	Strategy 1	Strategy 5	None
	Strategy 3	Strategy 3	Strategy 6	
	Strategy 10	Strategy 6		
	Strategy 11	Strategy 10		
	Strategy 12	Strategy 17		
	Strategy 13	Strategy 20		
	Strategy 16	Strategy 24		
	Strategy 17	Strategy 28		
	Strategy 20	Strategy 32		
	Strategy 22	Strategy 33		
	Strategy 24			
	Strategy 26			
	Strategy 28			
	Strategy 29			
Total	14	10	2	0

critical point of every item is $p < .05$
for both ANOVA and the post-hoc test

These results support Cohen's (1998) contention and confirm that students tend to overestimate (not underestimate) the frequency of strategy use once learners move away from instances of language learning or language use behavior. A reason for this overestimation can be assumed that students recollected multiple and varied experiences for each strategy when they answered the questionnaire without any attached task to do. Among those recollected experiences, they may have chosen the single experience in which they had used that strategy most often.

Table 4b. NT vs. ET/DT for the LG

Comparison	NT >		NT <	
	ET	DT	ET	DT
Strategy	Strategy 1	Strategy 1	None	Strategy 14
	Strategy 3	Strategy 3		
	Strategy 10	Strategy 4		
	Strategy 11	Strategy 11		
	Strategy 16	Strategy 19		
	Strategy 20	Strategy 20		
	Strategy 21	Strategy 21		
	Strategy 26	Strategy 22		
	Strategy 27	Strategy 23		
	Strategy 28	Strategy 25		
		Strategy 26		
	Strategy 28			
	Strategy 33			
Total	10	13	0	1

critical point of every item is $p < .05$
for both ANOVA and the post-hoc test

Research Question 2: Are the data collected through a questionnaire affected by the difficulty of the tasks to complete?

Table 5 presents the significant differences in the number of strategies used and in the types of strategies used between the ET and the DT condition. Almost one third of the strategies were affected by the difference in text difficulty (12 strategies for the HG and 10 for the LG, out of 34 strategies in total). This result indicates that the task difficulty could influence the data collected through the questionnaire in both the HG and the LG subjects.

On a closer look, the subjects in the HG and the LG seem to have reacted differently to task difficulty in the following two aspects: (1) the number of strategies which changed significantly in frequency according to task difficulty and (2) the analytical nature of the strategies used respectively in the ET and the DT conditions.

Concerning the first aspect, as Table 5 shows, the subjects in the HG used eight strategies significantly more often when they read the DT, whereas those in the LG used only four strategies more frequently. This might suggest that the subjects in the HG used a wider range of strategies in reading the DT.

Relating to the second aspect, the students in the HG seem to have been more analytical when they read the DT. They used analytical strategies such as 16, 17, 28 more often in the DT condition (Table 6). Also, the students reported an increase in the use of three strategies which imply the analytical activities are going on: changing speed (Strategy 12), subvocalizing a text (Strategy 13), and following the lines while reading with their fingers or pens (Strategy 26).

Table 5. Comparison: ET vs. DT

Proficiency Group	HG	LG
ET > DT	Strategy 2 Strategy 5 Strategy 6 Strategy 32	Strategy 3 Strategy 4 Strategy 19 Strategy 20 Strategy 23 Strategy 33
total	4	6
DT > ET	Strategy 9 Strategy 10 Strategy 12 Strategy 13 Strategy 16 Strategy 17 Strategy 26 Strategy 28	Strategy 10 Strategy 16 Strategy 24 Strategy 27
total	8	4
Gross	12	10

critical point of every item is $p < .05$
for both ANOVA and the post-hoc test

Table 6. Strategies Used More Often with the DT by the HG

Strategy	Description
Strategy 9	Before reading, I make use of the title to help predict the contents of the text.
Strategy 10	I give up reading a text when I have a difficulty.
Strategy 12	I change reading speed depending on the difficulty of a text.
Strategy 13	I subvocalize or read aloud the difficult parts of a text.
Strategy 16	I try to understand the meaning of unknown words by dividing it into parts such as prefixes, roots, and suffixes.
Strategy 17	I skim a text first and then read for details.
Strategy 26	I follow the line I am reading with my finger or my pen.
Strategy 28	I write slashes to segment a sentence grammatically.

The students in the LG, on the other hand, used six strategies less frequently in the DT than in the ET condition, while they employed four strategies more often in the DT than in the ET. This means that the harder the task was, the narrower the range of strategies the subjects employed became, which is quite opposite to the tendency found in the HG subjects.

A difference between the HG and the LG was also found in the analytical nature of the strategies used. When the subjects in the LG read the DT, they decreased the use of some analytical strategies (such as Strategies 3, 19, and 20 in Table 7). Furthermore, when the task became more difficult, the LG students used only one analytical strategy,

which is related to the analysis of vocabulary, more frequently (see Strategy 16 in Table 8 below). From these results, the LG students in the DT condition are more likely to have made an analysis only at vocabulary level, but not at grammatical or discourse level.

Table 7. Strategies Used Less Often with the DT by the LG

Strategy	Description
Strategy 3	I read a text focusing on a verb's tense, such as present tense and past tense.
Strategy 4	I try to understand the meaning of every word in a text.
Strategy 19	I read a text while checking what each pronoun refers to.
Strategy 20	I read a text underlining or marking important parts.
Strategy 23	I read a text by imagining the situations related to the contents of a text.
Strategy 33	I take notes while reading a text.

Table 8. Strategies Used More Often with the DT by the LG

Strategy	Description
Strategy 10	I give up reading a text when I have a difficulty.
Strategy 16	I try to understand the meaning of unknown words by dividing it into parts such as prefixes, roots, and suffixes.
Strategy 24	I try to understand a text without translating it into Japanese.
Strategy 27	I make use of the title to understand better while I am reading.

Based on the preceding findings, we can argue that the LG students seem to have stopped analyzing when a task became more difficult, which is quite opposite from that of the HG: they used more variety of strategies and made a more rigorous analysis in the DT condition. Taking this finding into consideration, less frequent use by the LG students of Strategy 24 in the DT condition might not refer to understanding a text without translating, but it means they are unable to translate.

5. Conclusion

Before concluding, a few limitations in the present study should be pointed out. First, in this study, the HG consisted only of male students, while the LG only of female students. Thus, differences found could be attributed either to the influence of proficiency or to that of gender. In this connection, the male students majored in engineering, whereas their counterparts were nursing students. Therefore, the influence of career-orientation might have also been present (Ehrman and Oxford, 1989; Oxford and Nyikos, 1989).

Another point is that the data in the three different conditions were collected in the same order in both the HG and the LG, which means there might exist the influence of order on the data collected.

With these limitations in mind, the major findings of this study can be summarized as follows: first, the data collected through a questionnaire is affected by the presence or absence of an actual task to do. Without any task, students tend to overestimate their use

of strategies. Thus, it might be advisable in the future strategy research using questionnaires that tasks be included. Second, task difficulty has an influence on data collected through a questionnaire. An influence was felt especially in terms of 1) the number of strategies whose reported frequencies changed according to the task difficulty and 2) the analytical nature of the strategies used more frequently in the ET and the DT conditions respectively. We thus can maintain that a questionnaire is a data collection method sensitive to task difficulty. The detailed description of task difficulty therefore is indispensable for comparing the strategy research using questionnaires.

Notes

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1. As Oller (1979) and Hughes (1989), among others, argue, cloze tests are considered to be a valid measure for assessing EFL proficiency.
2. On another scale (i.e., Flesch-Kincaid Grade Level), readability for the ET was 5 and 13 for the DT. For the details of readability, see Takeuchi (1999), for example.

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Appendix: Questionnaire for EFL Reading

1. 句・節等の文法的切れ目を意識して英文を読み進めていく。
(例： I think ・ that I know that tall boy ・ standing over there.)
(I read a text while paying attention to grammatical segments such as phrases and clauses.)
(e.g. I think ・ that I know that tall boy ・ standing over there.)
2. パラグラフ（段落）の切れ目を意識して読み進めていく。
(I read a text while paying attention to the beginning and the end of each paragraph.)
3. 文中の過去・現在等の動詞の時制に着目して読み進めていく。
(I read a text while focusing on a verb's tense, such as present tense and past tense.)
4. 文章中の単語の意味を一つ一つ理解しようとする。
(I try to understand the meaning of every word in a text.)
5. 与えられた英文を日本語に訳しながら読み進めていく。
(I translate each sentence into Japanese.)
6. 意味のわからない単語は、それがどのような意味か前後の関係から推測しようとする。
(I guess the meanings of unknown words using clues from the context.)
7. 最初のパラグラフ（段落）から最後のパラグラフまで、書かれてある順番に従って読み進めていく。
(I read a text from the beginning to the end in order.)
8. 文の主語、目的語がどれであるか、あるいは文型がどうなっているかなど、文の構造を意識して読み進めていく。
(I read a text while paying attention to the sentence structures, the subjects and the objects of the sentences and so on.)
9. 本文を読み始める前に、その内容がどのようなものか見出しからあらかじめ推測した上で、文章を読み始める。
(Before reading, I make use of the title to help predict the contents of the text.)
10. わからない箇所があれば、その先を読むのをあきらめる。
(I give up reading a text when I have a difficulty.)
11. 英文を読みながら、それが新聞記事であるか、科学論文であるか、小説である

かなど、ジャンルの違いを意識して読み進めていく。

(I read a text while considering the genre of the text, such as a newspaper article, a scientific paper or a novel.)

12. 文章の難しさに応じて、読む速度を速くしたり遅くしたりする。

(I change reading speed depending on the difficulty of a text.)

13. 難しい箇所は、口に出して、あるいは心の中で発音してみて、その意味を理解しようとする。

(I subvocalize or read aloud the difficult parts of a text.)

14. 意味のわからない単語は、一つ一つ意味を考えたりせずに、飛ばして読み進めていく。

(I skip unknown words while reading.)

15. 自分の持っている知識や情報と、文章の内容とを関連させながら読み進めていく。

(I link the content of a text with what I already know.)

16. 文章中の難しい単語や意味の分からない単語は、接頭辞や接尾辞などに分解して（例 un-friend-ly）その語の意味を理解しようとする。

(I try to understand the meaning of unknown words by dividing it into parts such as prefixes, roots, and suffixes.) (e.g. un-friend-ly)

17. 文章全体の大意をざっとつかんだ上で、次に細かく読む。

(I skim a text first and then read for details.)

18. 各単語の意味は知っているにも関わらず、英文の意味が解らない場合は、その箇所がどのような意味か前後の関係から推測しようとする。

(When I cannot understand a sentence, even if I know every word, I guess its meaning using clues from the context.)

19. 文中の代名詞は、何を指しているかを意識して読み進めていく。

(I read a text while checking what each pronoun refers to.)

20. 大切な内容の箇所に、下線を引いたり、印を付けたりしながら読み進めていく。

(I read a text underlining or marking important parts.)

21. わからない箇所があれば、その箇所を何度も読み返す。

(I read difficult parts several times.)

22. 口に出して、あるいは心の中で発音しながら読み進めるようにしている。

(I subvocalize or read aloud the entire text.)

23. 文章の内容に関して、イメージや映像を思い浮かべながら読み進めていく。

(I read a text by imagining the situations related to the contents of a text.)

24. 日本語に訳さず、英文のままで理解しようとする。

(I try to understand a text without translating it into Japanese.)

25. わからない箇所があれば、その箇所より前に戻って、そこからもう一度読み返す。

(I go back a few sentences and start reading again from there.)

26. 指や鉛筆などを使い、読んでいる英文の場所を追いながら読み進めていく。

(I follow the line I am reading with my finger or my pen.)

27. 読むときには、見出しを内容理解のための参考にしながら読み進めていく。

(I make use of the title to understand better while I am reading.)

28. 理解しやすいように、句・節等の文法的な切れ目に実際に印を付けながら読み進めていく。
(例： I think / that I know that tall boy / standing over there.)
(I write slashes to segment a sentence grammatically.)
(e.g. I think / that I know that tall boy / standing over there.)
29. 各単語の意味は知っているにも関わらず、英文の意味がわからない場合は、そこを飛ばして先を読み進む。
(When I cannot understand a sentence event if I know every word, I skip that sentence.)
30. 次にどのような内容が来るかを予想しながら、読み進めていく。
(I read a text while predicting what will come next.)
31. 文章の構成・展開を理解するために、接続詞やつなぎのことば（例： however, besides, etc.）に注意して読み進めていく。
(I read a text while paying attention to linking words such as “however” and “besides” in order to understand the text’s structure.)
32. 文章を読み終えたあとで、自分の言葉でその内容を要約してみる。
(I summarize the text in my own words after reading it.)
33. メモ書きしながら読み進める。
(I take notes while reading a text.)
34. 質問を先に読んでから、本文を読み進めていく。
(I read the comprehension questions first and then read the text.)