Coping with People who just won’t stay put:
The Use of Blaise in Longitudinal Panel Surveys

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The Issue : A Typical Household

Blaise Hamlet, Bristol UK

ONS Longitudinal Surveys (1)

Labour Force Survey

- Continuous Household Survey
- Collects data on labour market statistics, training, qualifications, income and disability
- Panel design, five waves at 13 week intervals
- Movers drop from sample
- All data from previous wave fed into case before issuing for subsequent wave

ONS Longitudinal Surveys (2)

ONE Survey

- Named person sample
- Collecting clients' experiences of ONE service, which delivered benefits, training and employment
- Two waves six months apart
- Movers were traced and interviewed at new address
- No data fed forward except name

ONS Longitudinal Survey (3)

General Household Survey

- Multi-purpose continuous Household Survey
- Collects data on a range of topics
- Panel design, five waves at yearly intervals
- Movers are traced and interviewed at new address
- A subset of the data from previous wave fed into holding block within case for subsequent wave

GHS: Fresh Challenges

- Movers kept in sample – removed from original case – transferred with data to new case in Field
- Those moving into sampled household become temporary members of sample while any of the original members remain resident
- Household arrays need to reflect changes – redundant elements removed

Feeding data forward (Rotation)

- Assign data from previous wave's database to current case(s)

DVAge	xMarSta	MarSta	MarBef	LivWth	Hhldr	DHC8	DVMrDF	DVAge4	DVAge5	DVAge6	DVAge9
37	NevMarr	NevMarr		No	LoneHldr		DFSingle	g25to64	g35to54	g25to44	g35to44
39	MarLiv	MarLiv			JntHldr		Married	g25to64	g35to54	g25to44	g35to44
76	Widowed	Widowed			LoneHldr		DFWidow	g75plus	g75plus	g75plus	g75to84

DVAge	xMarSta	MarSta	MarBef	LivWth	Hhldr	DHC8	DVMrDF	DVAge4	DVAge5	DVAge6	DVAge9
		NevMarr									

- MarSta:= RotData.QTHComp.QHComp[i].MarSta

Feeding data forward - Methods

- LFS Model: Feeding data directly into Fieldpane

	AxName	RestMe	ResMth	HLong1	ResBby	M3Cry	M3Cry
QResLen[1]	TINA	1	2			1	
QResLen[2]	KEVIN	1	2			1	
QResLen[3]							

- GHS Model: Showing fed-forward data in Infopane

TINA

How many years have you lived at this address?

Last time, this was recorded as 1 year 2 months

If less than one year, code 0

Dependent Interviewing

- ONS had and continues to use proactive dependent interviewing on its Labour Force Survey
- With research (e.g. Annette Jäckle) warning of issues with this approach, we favoured a different method for GHS
- Instead of reading data straight into the Fieldpane, the interviewer was instructed to re-read the question and then to compare it with last wave's data displayed as a text fill in the Infopane

Fed-forward data : Holding Block

- The External Database is read only once
- All data copied in one go into a Holding block (QRotate) from where the questionnaire picks it up
- Simplifies the code as the SEARCH and READ method only needs to be specified once
- The final database will contain data from both current and previous wave,
  - allowing easier comparison of data
  - Allowing opportunity to use data from two waves back for non contacts and refusals

Our Typical Household revisited

Blaise Hamlet, Bristol UK

Filter, Cut and Shunt

- Issue with what to do with those who moved to another address or became ineligible
- Creation of a Filter Block (at the start of the questionnaire before interview)
  - allowed for current status of each previous resident to be recorded
  - recorded new contact details for those who had moved
  - controlled the rotation of data – limiting it only to those still resident
  - managed the creation of spawned cases to process movers

Giving Interviewers control

- Each category of household member (eligible, mover, ineligible) to be processed using separate cases
- If movers still lived locally, it would be appropriate for same interviewer to process that case
- If movers now lived afar, it would be appropriate to reallocate the case
- Control of this process therefore needed to be in the Field before the cases were returned to the office
- Casebook allowed for duplicate cases to be spawned

Filter Block as the key to spawning cases

- Each case could easily filter out non-eligible persons on the basis of the Status accorded them in the Filter block
- Those not required for that case could be passed over, concertinaing the array to only those now eligible
- If non-eligible codes remain, it was then possible to force the interviewer to spawn a new household
- The remaining issue was how Blaise would know all required spawned households had been opened.

Using current database as an External

- The status accorded to household members in the original case indicated the number of cases to be spawned
- The current database therefore had to be specified as an External within its own Datamodel
- This allowed it to count the number of cases within the database
- Issue with compiling the Datamodel – requiring a “double compilation”

Mark Pierzchala

Code the appropriate current status for each household member for this wave. If anyone has moved, a new household needs to be opened for each address (known or unknown). If anyone is no longer eligible, open a new household and code all ineligibles irrespective of reason.

Last time, this person indicated they had no plans to move within the following three months

- 1. Resident here - eligible for interview
- 2. Resident here: Under the age of 16
- 3. Moved from Hhold 1 - Now resident locally; details known; can interview
- 4. Moved from Hhold 1 - Now resident elsewhere in GB; details known; reallocate
- 5. Moved from Hhold 1 - Now resident at unknown address
- 6. Ineligible - Died since last call
- 7. Ineligible - Now in institution (for 6 months or more)
- 8. Ineligible - Now resident abroad (for 6 months or more)
- 9. Ineligible - Mover at GSK, new case already created; or, No original Sample members left

	AxName	AxSex	AxAge	CurStat	MovedWth	DateMov	CountRes
QBFilter[1]	Mark Pierzchala	2	22				
QBFilter[2]	Lon Hofman	2	23				

The household from last contact has been split as follows.

THIS HOUSEHOLD (1): Mark Pierzchala; Lon Hofman; Hilde Degerdal; INTERVIEW - Still resident

NEW HOUSEHOLD (2): Tony Manners; INTERVIEW - new address local

1. Press <1> to continue

Seal

Seal

The household from last contact has been split as follows.

ORIGINAL HOUSEHOLD (1): Mark Pierzchala; Lon Hofman; Hilde Degerdal; INTERVIEW - Still resident

THIS HOUSEHOLD (2): Tony Manners; INTERVIEW - new address local

1. Press <1> to continue

Seal

Seal

ONS Visual CaseBook - Object Menu Version 1.4.1

Sample details:

Title:

GSL APRIL 2007 QUESTIONNAIRE

Questionnaire:

GSL0704A

Case:

5000 1 1

Details:

1 SURVEY COURT
SURVEY ROAD
SURVEYWOOD
SURVEYSHIRE
FINDOUT
KNOWNTOWN
ON1 1XX

HHOLD 1 - MultiHH Address - 2 households 3 2 110
HHOLD 2 - MultiHH Address - 2 households 4 1 440
xxxxxxxxxxxxxxxxxxxx CREATE NEW HHOLD xxxxxxxxxxxxxxxxxxxx

Use up/down arrows to select HHOLD, then hit Enter. Hit Esc to quit.

CaseBook for Windows Laptop Version 2.0.19

Look at | Manage Trays | Backup | Transmission System | Utilities | Casebook Setup | Field Manager Options | Payclaims | Set Mode With PIN | Help | Quit

Version 2.0.19

CaseBook Pending Tray - Current CaseBook objects

Authno: 1000

Date: 20 September 2007 Time: 13:21:18

```
GSL TRN  5000/ 1/ 1     MultiHH Address - 2 households       (Multi) all done.
GSL TRN  5000/ 2/ 1
GSL TRN  5000/ 3/ 1
GSL TRN  5000/ 4/ 1
GSL TRN  5000/ 5/ 1
GSL TRN  5000/ 6/ 1
GSL TRN  5000/ 7/ 1
GSL TRN  5000/ 8/ 1
GSL TRN  5000/ 9/ 1
GSL TRN  5000/10/ 1
```

There are 10 Casebook objects in this tray.

Operating mode is:

NORMAL

Last Recorded Backup Taken: Unknown

Questions