

# The achievements of the Swiss Household Panel

20 years: Where did we come from and where will we go



Schweizer Haushalt-Panel  
Panel suisse de ménages  
Swiss Household Panel

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# Preface

Twenty years ago began a great adventure with the launch of the first Swiss Household Panel (SHP) sample. It was in 1999. At that time, in Switzerland, longitudinal surveys were particularly rare in the fields of social sciences. The launch of the SHP was a pioneer study realized under the initiatives of visionaries.

Historically, the creation of the SHP was one of the key structural measures implemented within the framework of the Swiss Priority Programme (SPP) "Switzerland Towards the Future" to achieve two crucial goals: The first goal was to complement data collected by the Swiss Federal Statistical Office to ensure a solid database for social reporting on stability and changes in living arrangements and well-being in Switzerland. The second goal was to promote opportunities for quantitative social science research by providing social sciences and the international social science research community with high-quality longitudinal data based on the general population living in Switzerland.

The design and content of the SHP is based on insights from the social sciences and the experiences of various panel surveys in Europe and North America. Like other household panels, the SHP is an instrument that enables fine-grained analysis of individual processes and social dynamics. For the SHP, 2019 marks an important milestone because the SHP participants, and their children, have been followed up for the 20th time, providing a continuous sequence of data that enable the documentation of the living conditions in Switzerland for 20 years.

In 2018, almost 6,000 households participated in the survey and filled out the entire household questionnaire, and nearly 9,500 eligible individuals completed an individual questionnaire. Despite these large numbers, panels of this size face a major difficulty: declining response rates over time. To compensate for the attrition, two additional samples, the SHP\_II and SHP\_III, were added respectively in 2004 and 2013 to the initial sample from 1999. The year 2020 will coincide with the launch of a third refreshment sample, the SHP\_IV, scheduled to start in autumn.

Based on this rich and innovative empirical material, the aim of this informational brochure is to offer a set of illustrations of the value of the SHP. Its purpose is to demonstrate how crucial longitudinal surveys are for better knowledge of the dynamics or the inertia of social processes. Longitudinal analyses contribute to an in-depth understanding of the lives and diversity of experiences of individuals living in Switzerland, both over time and across generations. The findings from the study will help to inform and evaluate long-term policy decisions in diverse areas such as living conditions, health, education, or professional training.

Thanks for using the SHP data !



tillmann

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# Introducing the SHP: What we have learned since 1999

Since 1999, the Swiss Household Panel (SHP), an interdisciplinary longitudinal survey, has been one of the main empirical tools in social sciences in Switzerland. This survey aims to shed light on the processes, causes, and effects of social change. The SHP targets private households and provides information at the individual as well as the household level. Today, three nationally representative samples (started in 1999, 2004, and 2013) have been annually interviewed by the institute M.I.S. Trend. The main mode of interviewing conducted in (Swiss-)German, French, and Italian is computer-assisted telephone interviewing (CATI), despite the recent use of computer-assisted Web interviewing (CAWI) and computer-assisted personal interviewing (CAPI) as alternative modes. Additional research instruments, such as retrospective and biographical data, provide an even longer-term context. Furthermore, the SHP is included in the Cross-National Equivalent File (CNEF), which provides harmonized data from eight household panel surveys worldwide on demographics, employment, income, and health that allow for cross-country comparisons. The SHP is mainly supported by the Swiss National Science Foundation and is a part of FORS, the Swiss Centre of Expertise in the Social Sciences.

This informational brochure depicts some achievements of the SHP. The goal is to better understand what we have learned so far and what can still be learned through using this survey. In other words, what is the unique knowledge that this specific longitudinal data set provides us with? In the following, we aim at answering the following questions: Why is it worth undertaking such a complex investigation? What is the unique value of the SHP survey compared to other surveys? What are the advantages of the SHP?

The strength of longitudinal surveys such as panels, and the SHP in particular, is to adopt a life course perspective by introducing the notion of time and duration into the lives of individuals and their households. This implies that longitudinal surveys take into account the continuity or unfolding of a succession of events or transitions. Thus, they enable the investigation of changes or inertia and thus offer the possibility of studying developmental processes and their dynamics. By inserting the question of time, longitudinal surveys highlight causal links, dynamics, and processes.

Individuals experience more or less profound changes over time. For this reason, at the level of the individual, the introduction of time and duration provides opportunities for a better understanding of the dynamic of the evolution over time of individuals' quality of life, attitudes, opinions, or behavioural values. In that regard, the SHP provides broad information that would have been impossible to collect with cross-sectional data.

The introduction of time and duration thus enables the construction of individuals' trajectories in various domains of life, such as education, profession, family, or relationships. In addition, the SHP survey enables identification of the articulation of one individual trajectory to other biographical trajectories, highlighting their co-evolution

according to more general information such as the social origin of the individual and/or his/her gender. The main goal is then to better understand the logic, the structure, the dynamics, and the processes that underlie an individual trajectory within its relational and social environment.

Lives are lived in an interdependent way, are subject to socio-historical influences and are expressed through a network of shared relationships. Human lives cannot be adequately represented without their relationships with other important individuals, especially within households. The target of the SHP is the household; all household members are interviewed in the long run once they are 14 years old. It is therefore possible to take advantage of the structure of the data to better understand the interactions between all household members. The SHP captures, on the one hand, how individuals influence each other within the same household and, on the other, how these influences develop over time. Thereby, it becomes possible to gain more insights into the interdependencies between individuals' opinions, attitudes, behaviours, or trajectories within the same household.

Within the SHP, we encounter individuals born at different times, of different ages, and of different generations. This structure enables to distinguish the effects of age from period and from cohort. Disentangling the three effects is central because at equal ages, people born at different times may have very dissimilar characteristics because the socio-historical environment in which they grew up was different. The age cohort model is a theoretical model that aims to explain how society changes over time. This theoretical model assumes that the variation over time occurs due to the simultaneous operation of three factors: individual ageing, the influences of the period (the socio-historical context), and generational turnover (or cohort).

People do not only live in particular household constellations at specific points in time but also evolve in specific contexts. The SHP data are representative of all households in Switzerland, which makes it possible to aggregate data at the cantonal level. Each of the 26 cantons has high administrative autonomy, creating a certain amount of cultural and socioeconomic diversity that allows for an ecological approach. The SHP thus enables an investigation of different contextual characteristics to better understand how the context acts as either risk or protective factor. Linking the individual to the surrounding environment helps to better understand the processes that underline the influence of the contextual characteristics on individuals' lives.

Finally, the SHP is designed as a resource for the social research community. Currently, more than 2,000 researchers and students have access to the SHP data, generating around 700 scientific publications. This informational brochure reflects key achievements of the SHP.



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# Does money buy happiness?

One of the strengths of the SHP is to introduce the notion of duration and time into the lives of individuals and their households, enabling the study of change as well as inertia. Over time, depending on different life phases, individuals are led to experience more or less profound changes in different aspect of their lives that impact their quality of life and life satisfaction. Based on these assumptions, a major goal of research on life satisfaction is to examine the factors that predict life satisfaction and the processes that underlie it over the life course. Income has long been of interest to psychologists, economists, and laypeople alike. Intuitively, income should be linked to some extent with life satisfaction because income predicts many additional factors that would be expected to be associated with subjective well-being.

Cross-sectional studies have established to what extent people with more money have higher subjective well-being than those with less money. However, they do not tell the entire story because they are limited in what they can reveal about the processes underlying this association. The main question is to what extent income may mean different things to people at different ages. Therefore, the association between income and life satisfaction may vary at different points in the life course. In addition, the reasons income might be associated with life satisfaction should be better understood: The effect of income on life satisfaction could be moderated by individual differences and, thus, the effect might be stronger for certain individuals and weaker for others. Few studies have addressed these particular questions because they require the availability of longitudinal data from a sufficiently long time span so that real changes in income can be captured.

Cheung and Lucas examined the association between income and life satisfaction over the life course based, among other data sets, on the SHP. They argued that developmental changes across the life course suggest that the links between income and life satisfaction may vary over the life course. They assumed that weaker associations between income and life satisfaction among younger adults or older adults would be observed. Among younger adults, they expected income to be weakly related to life satisfaction before they begin their professional careers. This weakened association could also be expected among those who are working but are in low-paying positions. Finally, weaker associations between income and life satisfaction among older adults could be explained because they might have already reduced their retirement savings.

Based on past literature, a potential explanation for the moderating effect of age is that the centrality of family and work tends to peak in midlife (individuals roughly in the 30- to 50-year-old range). If this is the case, both between-person and within-person effects of income should be enhanced. Midlife adults who are generally richer (higher between-person income) and midlife adults who earn more in a particular year (higher within-person income) detain more financial resources, thus making income a more important contributor to well-being. Therefore, the enhanced emphasis placed

on family and work by midlife adults could help explain why both between-person and within-person income become particularly important for well-being for midlife adults.

*An increase in income over time was associated with higher life satisfaction. However, the associations between life satisfaction and income varied across different points in the life course: The associations were generally stronger for midlife adults compared to younger adults and older adults.*

The results of the study tend to confirm the various hypotheses. First, consistently with past research, the between-person association between income and life satisfaction was significant, suggesting that richer individuals tended to report higher life satisfaction. Second, at the within-person level, income also significantly predicted life satisfaction. The changes in income were significantly associated with changes in life satisfaction. That is, increase in income over time was associated with increase in life satisfaction. Third, the most interesting finding from this study is perhaps that both the within- and between-person associations varied across different points in the life course. As assumed, the associations between life satisfaction and income were generally stronger for midlife adults (i.e. individuals roughly in the 30- to 50-years-old range) compared to younger adults and older adults. This result can be explained by the fact that midlife adults often have more financial responsibilities compared to individuals who are younger or older.

To conclude, the associations between income and life satisfaction were particularly strong for midlife adults compared with younger adults and older adults. Taken together, the findings suggest that if money does buy happiness, it does so to different degrees, at different periods of the life course, for different people.

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Freely taken and adapted from Cheung, F., & Lucas, R. E. (2015). When does money matter most? Examining the association between income and life satisfaction over the life course. *Psychology and Aging*, 30(1), 120–135. <http://dx.doi.org/10.1037/a0038682>.



## Should I stay or should I go? The different stages of educational trajectories in Switzerland

Another strength of the SHP is the availability of biographical retrospective data introduced, respectively, in 2002 and 2013. Therefore, it is possible to construct complete individual trajectories in various domains of life. Pollien (2010) proposed an analysis of educational trajectories and their articulation to other biographical lines, highlighting their evolution according to the social origin and gender of the individual. Retrospective biographical data make it possible to report on the consecutive phases that make up the curriculum of a person in training. By addressing educational history, this approach opens up a different perspective compared to information based only on the last diploma obtained or the highest educational level achieved. The goal of this research was to better understand the structure, dynamics, and processes that underlie an individual's educational trajectory.

In Switzerland, two well-differentiated standard training channels stand out: on the one hand, the general studies pathway through schools, leading to the completion of the diploma, which provides access to advanced education, and on the other hand, the vocational sector dominated by dual apprenticeship; companies take care of apprentices in parallel with the courses of professional associations. Vocational training in this form has a practical orientation that makes it relatively distinct from the academic pathway. In 1993, the creation of the professional maturity training opened the doors of the universities of applied sciences and narrowed the gap between the two sectors.

Based on the SHP biographical retrospective data, five types of individual general educational trajectories, distinguished mainly by the two well-differentiated standard training channels, have been identified. As a proxy for the evolution of the Swiss educational system, two birth cohorts have been distinguished for the analyses: individuals born before 1951 and individuals born after 1951.

The five different educational trajectories can be briefly described as follows. The first type is composed of individuals who stopped their educational trajectory at mandatory school. In this group, the professional trajectories were first reduced to their elementary form and then pursued in an abridged version. The second type concerns individuals who undertook a vocational stream. Individuals in this category might differ according to the length of the educational trajectories as well as whether they did or did not experience an interruption during their educational trajectory. This type is the main educational trajectory pertaining to about half of the sample. The third type includes individuals who undertook an advanced vocational stream. After initial educational training, people engaged either directly in advanced educational training or experienced a break between educational training and the start of advanced training. The fourth category concerns individuals who undertook advanced education. This educational type is characterized by different stages. Some individuals took a state graduation examination, the Matura, while other individuals took a state graduation examination and then started a university degree after a different

kind of break between the two stages. The fifth category is characterized by mixed, complex, and disparate vocational streams borrowing from both vocational and general studies. Mixed trajectories represent 9% of the sample. Because of their heterogeneity, these trajectories are difficult to describe.

*The novelties of the second half of the 20<sup>th</sup> century are first, an observable trend towards lifelong learning and second, the last diploma does not reflect the complexity of the individuals' educational trajectories.*

A first result highlighted that, nowadays, the information about the last diploma does not reflect the complexity of the individuals' educational trajectories, particularly for the most recent cohort. A second result describes that the structure of the inequality between the social categories has remained stable since the beginning of the 1990s. When comparing the two birth cohorts, the main type of professional trajectory has remained almost identical, but some patterns have become dated, such as professional trajectories without post-scholar training, as well as accelerated training or prolonged professional interruptions. A remarkable revolution, however, is the entry of women into the world of vocational or university training. However, the general increase of both individuals with a vocational training or university degree between 1930 and 1990 should not be interpreted as a democratization of education but rather as an inflation, a devaluation of titles that expands the duration of training necessary to reach a comparable professional position. A second revolution is the emergence of a new, mainly male, trajectory. Higher education, which is part of the applied logic of vocational training, was conquered by men who were able to deepen their knowledge acquired in an initial formation. The most frequent passage through the two streams indicates a confusion of the opposition between applied and theoretical teaching. This indicates a development of tailor-made training trajectories.

To conclude, the novelty of the second half of the 20th century is an observable trend towards lifelong learning. This is especially apparent for individuals who worked for a long time but went back to school to acquire new competencies and expected an increase in their competitiveness in the labour market.

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Freely taken and adapted from Pollien, A. (2010). Faire une pause ou bifurquer ? Essai de typologie des trajectoires de formation. *Education et Sociétés*, 26(2), 123–143. doi:10.3917/es.026.0123. Pollien, A., & Bonoli, L. (2010). Itinéraires de formation et lignes biographiques. *Revue Suisse de Sociologie*, 36(2), 277–297.





## Does marriage make you happier?

With annual interviews since 1999, the SHP is a good tool to retrace individual trajectories and identify a certain number of life events or life transitions that are lived by each individual. Kalmijn (2017) investigated the effect of two different life transitions and life events on different health-related outcomes, marriage entry and marriage exit, based on a 16-year period.

Kalmijn (2017) reviewed and questioned the positive link between marriage and health that has frequently been analysed and typically been interpreted in terms of health protection. A large number of studies have claimed that marriage promotes adult health. For instance, married people are believed to have fewer physical health problems, to have better overall health, to live longer, to experience lower levels of psychological distress, and to be less depressed. Several explanations have been suggested for the protective effects of marriage and other personal relationships more generally. Marriage has a positive effect on men's wages and therefore brings financial advantages, leading to healthier living conditions. In addition, marriage has a social control function that tends to lead a spouse to adhere to social norms, prohibiting unhealthy behaviours. Finally, a marital relationship is a source of social support and affection, which may reduce loneliness and depressive feelings, hence leading to better mental health. However, the health benefits have been criticized by sociologists who argue that singles are relying on alternative relationships and ways of belonging that benefit their health. Some psychologists have been critical as well and have argued that researchers have overstated the evidence and interpreted findings too quickly in terms of health protection.

For these reasons, Kalmijn (2017) statistically compared the effects of marriage entry and marriage exit and tested the duration effects during marriage and during singlehood after divorce. Due to the longitudinal nature of the data, it was then possible to obtain a detailed view of post-transition dynamics on various dimensions of health. This analysis should investigate the idea of marriage protection in a more stringent manner on four health dimensions: general health, illness, mental health, and life satisfaction. One of the goals of this research was to identify to what extent there is adjustment to the life event or whether individuals experience accumulation effects on health regarding the life event. Adjustment means that marriage or divorce could entail only a temporary increase/decrease in well-being, so after a certain period of time, people might return to their original level of well-being, determined by stable personality characteristics. In contrast, the accumulation effect means that the positive effect of marriage and the negative effect of divorce become stronger over time.

The goal of this research was to compare levels of different dimensions of health both before and after marriage and divorce, respectively. The results indicate first that the impact of divorce is about two to three times stronger than the impact of marriage entry. In many cases, the effects of marriage entry are very small. Second,

after marriage entry and after marriage exit, there is adjustment and no accumulation, which means that health does not improve during marriage, nor does it deteriorate. Especially after divorce, the author demonstrated recovery over the years. Third, the results are sensitive to the outcome considered; this means that the effects are stronger for the dimension of life satisfaction, weaker for mental health, and almost absent for the other two health-related measures considered.

*The effects of marriage entry are very small. After marriage entry and after marriage exit health does not improve, nor does it deteriorate.*

To conclude, there is much evidence for a loss perspective, especially the strong negative divorce effects on depression and life satisfaction and the tendency to recover from this decline. In other words, differences in health according to marital status reflect the strains of marital dissolution more than they reflect any benefits of marriage. A divorce is not only a stressful life event; it can lead to strong negative emotions which reduce a person's mental health. In addition, adjustment is also stronger for loss than for gain. Furthermore, based on the results, marriage tends to have more to do with mental than with physical health. The limitation to mental aspects of health is consistent with the loss perspective. It seems that marriage might change people's cognitive evaluations of their lives more than it affects their mood or happiness. Marriage is a highly valued goal in society, and being divorced is not a state that people aim for. This results in a poorer evaluation of one's life, without necessarily feeling more depressed. Although emotions can be strongly affected in the short term, this research indicates that marital transitions affect cognitions more strongly than they affect emotions.

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Freely taken and adapted from Kalmijn, M. (2017). The ambiguous link between marriage and health: A dynamic reanalysis of loss and gain effects. *Social Forces*, 95(4), 1607–1636. doi:10.1093/sf/sox015.







## How happy are elderly women?

The SHP comprises individuals of different ages, born at different times. This structure of the data makes it possible to distinguish the effects of age from those of the period and of the cohort. Separating the three effects is essential because at equal ages, people born at different times have very dissimilar characteristics because the socio-historical environment in which they grew up was different. The period effect results from external factors that equally affect an age group at a particular point in time, and only a longitudinal survey enables studying this dimension. The cohort is a set of individuals who have experienced the same event at the same time; the cohort effect designates the modifications that the group will undergo. Based on this theoretical framework, Burton-Jeangros and Zimmermann-Sloutskis (2016) precisely examined the distribution and trajectories of life satisfaction among elderly women living in Switzerland.

*Elderly women living in Switzerland are rather satisfied with their lives despite limited resources. However, life satisfaction trajectories are affected by a cohort effect: Women of former cohorts experienced a faster decline in life satisfaction than women of more recent cohorts.*

From a life course perspective, the study of life satisfaction must combine factors of change over time, at both the individual and societal levels. Differences observed in the comparison of age groups might not be solely attributable to individual ageing but rather to differences across cohorts, associated with changing social conditions. To disentangle age, period, and cohort effects, the authors compared two age categories – the ‘young old’ (65–74 years) and the ‘old old’ (75–86 years) – and within each of these, three successive cohorts – individuals born between 1916 and 1925, those born between 1926 and 1935, and baby boomers born between 1936 and 1945 – while controlling for the calendar year, which is the period.

When they turn old, people convey with them the social positioning they experienced throughout their life. For this reason, it is crucial to take into account the contexts of lives that are changing associated with their consequences for human development and ageing. This perspective combines individual choices over time but also the social influences and constraints that shape opportunities that change depending on the period in which individuals grew up.

Consequently, life satisfaction dynamics should be observed at two different levels: as ‘within-subject change’ and as ‘between-subject difference’. ‘Within-subject change’ refers to the evolution of the individual’s quality of life over his or her life course. ‘Between-subject difference’ considers differences among social groups, as well as among different birth cohorts who were born and grew up in specific social contexts.

The authors hypothesized that life satisfaction would vary as individuals get older and that individuals from different cohorts might experience different ageing patterns due to their life course experiences through different periods in a changing society.

The results show first that overall, elderly women living in Switzerland are rather satisfied with their lives. However, the analyses also show that life satisfaction trajectories are affected by a cohort effect: Women of former cohorts experienced a faster decline in life satisfaction than women of more recent cohorts. These patterns were observed for the ‘young old’ and the ‘old old’ groups. In addition, more recent cohorts are in general less satisfied with life than former cohorts of the same age, but they are more educated, more satisfied with their income, have higher social support, live more often with a spouse, and are slightly healthier.

The authors also demonstrated that among the ‘young old’, the mean life satisfaction score did not significantly vary across cohorts. However among the ‘old old’, women born between 1916 and 1925 were slightly more satisfied than those born between 1926 and 1935. In addition, in both the ‘young old’ and the ‘old old’, life satisfaction scores were significantly lower for the more recent cohorts.

This result can be explained by the fact that expectations can change over time, with women born later having experienced good living conditions during their adulthood and being more demanding in regards to their retirement. Another explanation relates to the fact that experiencing some adversity over the life course may reinforce resilience at later stages. Hence, older women who participated in the SHP experienced more adversity than the more recent cohort. Living conditions have changed in the last decades; these changes have particularly affected baby boomer cohorts in general and women’s life conditions in particular. The findings suggest that between-individual socio-economic resources may not be the only determinants of life satisfaction. Within-individual characteristics are probably equally important for the level of life satisfaction. The main conclusion is that elderly women are able to maintain their life satisfaction despite limited resources, which is positive news.

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Freely taken and adapted from Burton-Jeangros, C., & Zimmermann-Sloutskis, D. (2016). Life satisfaction trajectories of elderly women living in Switzerland: An age–period–cohort analysis. *Ageing & Society*, 36(1), 106–132. <http://dx.doi.org/10.1037/a0038682>.







## How do individuals deal with disabilities in their families?

# 5

The target of the SHP is the household; all household members are interviewed in the long run. It is thus possible to better understand, first, how individuals influence each other within the same household, and second, how these influences develop over time. The present article aimed at illustrating these two fundamental aspects of the SHP by gaining more insight into how care and support of people dealing with long-term disabilities affects the entire family. The author modelled the impact of the health status of family members under three scenarios: mother disabled, father disabled, and son/daughter disabled. A better understanding of the processes of the impact of cohabiting with a person suffering from long-term disability on the health status of all members in a family is crucial. Long-term disability represents a life-changing event for the entire family, not only because of the stress caused by seeing a significant other suffering but also because it requires an important change in the family organization. In most cases, a family member undertakes the role of caregiver, and the rest of the family members adjust their daily schedules to collaborate and support the new family configuration.

The results are examined with respect to the same sex and role in the family to control for the bias created by differences in self-reported measures, where women and men reflect significant differences in their response scales. In this way, it is possible to see how the effect varies depending on the members' relationship to the disabled relative. In addition to the opportunities the SHP offers to control for the position within the household, its longitudinal aspect is also crucial. Because the information of the time since the family member began dealing with a long-term disability is available, it is possible to estimate the effects over time. It is then possible to better understand the dynamics of the impact of the long-term disability of household members on the health status of all members in a family in the long run. After the initial shock, the health status of the family members is expected to decrease drastically. However, over time, the situation should improve, and people can even recover to health statuses similar to those of the general population. Thus, the SHP enables studying the non-linear impact of family member health deterioration, which might help to design policies that define the best timing for intervention.

*All family members, not just the main caregiver, show a consistently reduced health status that varies, however, depending on the sex of the family member and the role within the family.*

The results confirm the presence of spillovers in households in which a family member deals with a long-term disability. The results suggest that cohabiting with a person dealing with a long-term disability has a significant negative impact on the health status of the rest of the family members. All family members, not just the main caregiver, show a consistently reduced health status. This result varies, however, depending on the sex of the family member

and the role within the family. In addition, the estimated effects slightly vary in magnitude, depending on the type of relationship with the disabled member, and over time. The study highlights that the effect on family members is not the same when the mother is disabled compared with when the father is disabled. It appears that children are more affected when the mother is disabled. The same is true for parents. If a son/daughter is disabled, parents are more affected than when a partner is disabled. Concerning long-term effects, the path describes a non-linear impact by male and female groups. In fact, at the beginning, there is a sharp decrease in the health status of everyone; however, over time, it improves. In general, the size and evolution of the impact on the health status of the family members is not linear and depends on the relationship with the disabled person. Accordingly, women (mothers and daughters) show the worst effects. Men show weaker effects, with sons the least impacted. More specifically, for parents, the worst case is if one of their children is disabled, with mothers the most affected. For partners, female and male partners show the same effects. However, female partners seem to more quickly adapt to the situation when their partner is disabled; men require more time when their partner is disabled. For children, the worst case is if the mother is disabled. Sons and daughters require more years to improve their health status if the mother is disabled compared to if the father is disabled. For daughters, however, even when there is an improvement in health status over time, it never reaches similar levels as if the father is disabled. Finally, if one of the siblings is disabled, brothers and sisters show similar behaviours.

To sum up, the long-term disability of a household member represents a life-changing event for the entire family and requires important changes in the family organization. In most cases, a family member undertakes the role of caregiver. The rest of the family members adjust their daily schedules, but household members react in heterogeneous ways in function of their role within the family to the long-term disability of the family member.

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Freely taken and adapted from Pacheco Barzallo, D. (2018). Spillover effects of long-term disabilities on close family members. *Applied Health Economics and Health Policy*, 16(3), 347–355. <https://doi.org/10.1007/s40258-018-0391-9>.





## How do conflicting political views within families impact political engagement?

Aside from the effect of life events on other family members, another advantage made possible by the SHP is the possibility to study the interdependencies between individuals' opinions or attitudes within the same household. Individuals interact with each other and therefore might influence to some extent each other's opinions or attitudes. What happens, for example, when an individual is surrounded by partisan disagreement in his or her household? This is exactly the question raised by Fitzgerald and Curtis (2012): What happens to a person's level of political engagement when he or she is surrounded by partisan disagreement within the household in three different democratic contexts: the UK, Switzerland, and Germany? Because the SHP is a part of the Cross-National Equivalent File (CNEF) that provides harmonized data from household panel studies from other countries, it is also possible to compare the Swiss situation with those of other countries that have a different democratic context.

The UK has majoritarian elections with low party-system fragmentation and is among the least consensual democratic systems in the world. In contrast, Switzerland is significantly less competitive; it has a proportional representation system with high party fragmentation and is known as a prototypical consensus democracy. Germany stands between these two extremes: It uses a mixed-member electoral system that combines features of both majoritarian (single-member districts) and proportional (proportionality in the legislature) systems. It also has intermediary levels of party fragmentation and consensus democracy.

*Parental discord promotes political engagement. The positive effects of political heterogeneity in the family are largely made possible through the relative absence of accountability pressures.*

In the political literature, two main theories have been used to explain the link between discord in the environment and political engagement. On the one hand, studies from the social arena have identified a positive relationship between discord and engagement, while on the other hand, network studies have found the opposite. Research on disagreement in the social arena has examined partisan heterogeneity in a particular setting, typically geographically defined. Research in that field has demonstrated that in discordant situations, people feel the need to engage in political competition to pursue their own interests. In addition, people become politically informed through exposure to divergent viewpoints and are therefore better equipped to engage in politics. As opposed to this theoretical framework, network studies have found that political diversity in interpersonal networks has mostly negative implications for political engagement. An individual's political engagement decreases when his or her political conversation partners hold divergent viewpoints. A proposed psychological mechanism driving this tuning-out process is ambivalence. When people feel ambiva-

lent, competing considerations preclude them from actively engaging in politics. A second posited mechanism is social accountability or conflict avoidance. People tend to avoid conflict by hesitating to take sides and risk alienating a fraction of their networks.

In light of this divergence, the authors raised the following question: Should parental disagreement operate more like a context and promote political engagement, or should it function more like a social network that inhibits it?

The results tend to demonstrate that parental discord promotes political engagement. However, parental disagreement has a different impact according to the different political environments. The picture that emerges is that German and Swiss political interest is boosted by parental disagreement. However, in the UK, the effect of parental disagreement is not statistically significant. In addition, the Swiss subnational analysis provides insight into such geographically varying patterns, as the positive implications of disagreement are greatest in cantons reliant on proportional representation elections and weakest where majoritarianism dominates. Altogether, these results reveal the conditioning role of institutions, shed light on micro-level mechanisms, and contribute to the broad debate about discord and political participation.

The results reveal that the least competitive systems host the most positive effects of parental discord on political engagement. It appears that it is the electoral system itself that matters, followed by political structures designed to build consensus in governing. This invites consideration of what it is about proportional representation, in particular, that enables disagreement to enhance engagement.

These findings suggest that the positive effects of political heterogeneity in the family are largely made possible through the relative absence of accountability pressures. The positive direction of the results can be explained by the fact that social pressures are weaker in a setting as safe and comfortable as the family.

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Freely taken and adapted from Fitzgerald, J., & Curtis, K. A. (2012). Partisan discord in the family and political engagement: A comparative behavioral analysis. *The Journal of Politics*, 74(1), 129–141. doi:10.1017/S0022381611001150.





## How healthy are single mothers living in Switzerland?

One of the strengths of the SHP is to have a random sample of households living in Switzerland. Consequently, it provides information at two levels: the individual level and the household level. In addition, it is possible to distinguish individuals with different socio-economic status as well as different civil status. For this reason, the SHP enables the comparison of different sub-groups within a population, taking into account their household characteristics. The current study took advantage of these different aspects and aimed at considering the association between health and employment in Switzerland, among lone mothers and partnered mothers.

Switzerland presents low levels of welfare support for parents that coexist with a highly gendered division of labour, high prevalence of part-time employment among women, and a wide gender pay gap. This national context might expose mothers who care for their children alone to a considerable amount of stress; while family care is framed as a private matter, income returns from labour market participation are particularly disadvantageous for women. Consequently, the authors argued that lone mothers will report poorer health than mothers living in a couple because of their dual role as the main earner and primary/sole caregiver.

It has been consistently shown that individuals in couple experience better physical and psychological health and longer life expectancy than individuals without a partner, whether widowed, divorced, or never married. An important mechanism driving this association is that partnered individuals benefit from additional emotional support, which in turn fosters better health. After separation and divorce, mothers are usually the ones who have custody rights to their children: For them, negative health outcomes also reflect the added strains of becoming both the main breadwinner and sole/main caregiver in the household, as well as the perceived loss of emotional support.

*In the Swiss context, lone mothers, especially those who do not work, express poorer health than partnered mothers.*

Even though the dissolution of a conflict-ridden partnership might foster improvements in women's health and well-being, there is evidence of negative consequences on psychological health around the time of divorce and physical health effects longer after divorce. In addition, the transition to lone parenthood implies a change in the division of roles that might be accompanied by a proliferation of stressors, such as a drop in economic resources and increased financial problems, greater parental strains, and more social isolation, which in turn have a detrimental effect on both physical and psychological health outcomes. Such negative effects of experiencing lone parenthood in early and midlife are found to be associated with poorer health and higher risk of disability in later life.

The results demonstrate that in the Swiss context, lone mothers, especially those who do not work, express poorer health than partnered mothers. This association does not seem to be explained by their tendency to have a lower income. The data set does not allow for discerning clear mediation effects of education and employment characteristics. The effects are suggested by the fact that lone mothers with secondary education and with small part-time jobs (i.e. working less than 50%) are more likely to report poor health. The authors argued that because these mothers have invested in acquiring a higher level of human capital compared to women with less education, they might be less likely to disengage from paid work and rely on social assistance. However, their health might be negatively affected by the greater time and economic constraints they experience in contexts where outsourcing of childcare is expensive.

The simultaneous associations found between employment, family, and health conditions of lone mothers hint at specific interactions between different life domains, which are likely to result in multiple disadvantages and health inequalities. Such situations might result in a general disadvantage that could produce further vulnerability, particularly when welfare policies are based on a normative understanding of the family (a couple with a main earner and secondary earner/primary caregiver) and labour market participation (full-time employment for the main earner and part-time employment for the secondary earner).

The results suggest that in Switzerland, although financial support is provided to the most economically disadvantaged mothers heading a single-parent household, those who are less likely to rely on welfare support and at the same time have a low level of bargaining power in the labour market (signalled by their part-time participation and poor qualifications) represent a potentially vulnerable group with specific health disadvantages.

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Freely taken and adapted from Struffolino, E., Bernardi, L., & Voorpostel, M. (2016). Self-reported health among lone mothers in Switzerland: Do employment and education matter? *Population*, 71(2), 187–213. doi:10.3917/popu.1602.0193.







# Do cantons influence individual levels of hopelessness?

# 8

A major strength of the SHP is that individuals are nested within households and within the 26 cantons of Switzerland. In combination with its large sample size, this structure makes it possible to aggregate data at the cantonal level, enabling the study of the effects of contextual characteristics on the individual; in other words, the effects of the psychological aspects of the environment, namely, the emotional climate, on individuals. Each canton has high administrative autonomy and differs in its cultural, demographic, and economic characteristics. This creates a certain amount of cultural and socioeconomic diversity. Based on this major advantage of the SHP, Morselli (2017) aimed to examine the effects of contextual characteristics on the individual by combining the data of the SHP with other data sources.

Feelings about a bleak and hopeless future play an important role in the development of depression and have been argued to be a key factor linking depression and suicide. In contrast, positive perspectives of the future might be important psychological resources to overcome the experience of stressful events and could enhance individuals' sense of agency and reinforce a positive self-image. Identifying the factors associated with positive or negative perceptions of the future is crucial to promote individual well-being. To date, two main theoretical approaches have been applied to the study of hopelessness. The first focuses on individual psychological factors, such as personality and life experiences, whereas the second examines contextual characteristics. Morselli (2017) argued that both individual and contextual factors play important and concurrent roles. Individual and contextual approaches were integrated in this study to demonstrate that aspects of the environment, namely, the emotional climate, may influence perceptions of the future in addition to personal characteristics, life experiences, and socioeconomic factors.

*A proportion of hopelessness was explained at the contextual level: Socioeconomic conditions and the optimistic and depressive climates that prevail in cantons also affected individuals' perceptions of hopelessness.*

This study aimed to examine the effects of contextual characteristics on individuals' sense of hopelessness by focusing on the case of Switzerland. The Swiss territory is divided into 26 cantons and four languages. The cantons differ in their cultural, demographic, and economic characteristics; for instance, taxation and welfare measures affect all residents of a given canton in the same way, but these measures differ from canton to canton. The boundaries between cantons are rigid from a socioeconomic perspective and are more clearly defined than other contexts, such as neighbourhoods.

Morselli's (2017) study has many implications: A strength of the SHP is the possibility to be combined with different sources of data sets. A second implication relies on the necessity to take an ecological approach to link the individual to the surrounding environment to better understand the complex processes of the impact of the context on the individual's life.

The results demonstrate that hopelessness is primarily affected by individual factors such as personality and life events. However, a proportion of hopelessness was explained at the contextual level: Analyses revealed that socioeconomic conditions and the optimistic and depressive climates that prevail in cantons also affected individuals' perceptions of hopelessness. Respondents who lived in wealthier cantons were less hopeless than respondents in poorer cantons. In cantons with a higher unemployment rate and high levels of shared negative emotions, respondents reported more hopelessness. In contrast, positive emotional climates played a protective role against hopelessness.

The results of this study provide new insights into hopelessness and depressive symptoms by showing the associations among hopelessness, unemployment rate, and emotional climate in Switzerland. Although the individual remains the main focus of the study and inter-individual differences and intra-individual processes have considerable weight in explaining hopelessness, the context plays a key role. According to the author, failing to consider the contextual effects would enable only a partial understanding of the phenomenon.

These results are fundamental for Swiss health institutions and services to guide health interventions that should be considered at two different levels. Interventions that concurrently address individual and contextual characteristics may be more effective. In addition to interventions that aim to improve individuals' medical health, interventions should consider reducing socioeconomic disadvantages at the collective level, thus promoting a positive emotional climate and a culture of psychological well-being.

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Freely taken and adapted from Morselli, D. (2017). Contextual determinants of hopelessness: Investigating socioeconomic factors and emotional climates. *Social Indicators Research*, 133(1), 373–393. doi:10.1007/s11205-016-1346-x.





# What future for the SHP?

This informational brochure depicted how important the SHP has been for the research landscape during the last two decades. It offered a set of examples of the value of this longitudinal survey and demonstrated how determinant the SHP is for a better understanding of the dynamics or inertia of a large number of social processes.

Since 1999, the SHP enables the documentation of the living conditions in Switzerland for 20 years. However, surveys of this magnitude are complex and evolve over time. The initial sample launched in 1999 faced some attrition problems. To maintain a sufficiently large sample size and to adapt the SHP sample to the evolution of the structure of the Swiss population, two additional samples, SHP\_II and SHP\_III, were added respectively in 2004 and 2013, allowing for robust statistical analyses. For the SHP\_I, SHP\_II, and SHP\_III, the dominant mode of interview has always been telephone interviewing. However, concerns regarding increasing costs, decreasing response rates, and the decrease in the number of households with a fixed telephone connection have prompted the SHP to explore alternative modes of interviewing. Advances in information and new communication technologies and the increasing use thereof suggest that a promising alternative mode is online interviewing (CAWI). At the same time, the use of CAWI for a household panel raises a large number of questions. To test the ways in which offering the Web as complementary mode affects response rates, sample composition, and measurement at the individual and household levels, the SHP launched a two-wave pilot study in preparation for its fourth refreshment sample, incorporating a mixed-mode experiment in 2018 and 2019.

*The first questions generated by the initial results of the pilot survey concern measurement equivalence between the different modes of interviewing and the possibility to combine them.*

Initial results based on this two-wave pilot survey tend to show that the current CATI design still performs better compared to CAWI. However, the costs induced by a CATI survey tend to be higher compared to alternative CAWI modes. Furthermore, CAWI performs quite well concerning the participation rate. However, the CAWI survey has raised some concerns regarding the quality of the data, which differs significantly from CATI and CAPI modes. The first questions generated by the initial results of the pilot survey concern measurement equivalence between the different modes of interviewing and the possibility to combine them. We ought to say that the launch of the fourth SHP sample presents a large number of exciting challenges!

The results of this two-wave pilot survey will shape the procedure for the next refreshment sample (SHP\_IV). Hence, the 21st year of the current SHP will coincide with the launch of a third refreshment sample of the SHP (SHP\_IV) that is scheduled to start in autumn 2020. This new sample will continue to provide a better understanding of the complex trends affecting Switzerland in a social context in which some changes become more and more rapid.

*One of the key challenges for the SHP will reside in the possibility to link its data with administrative data to obtain high quality information.*

In the future, another key challenge for the SHP will reside in the possibility to link its data with administrative data. This type of data linkage aims at obtaining high-quality information from existing registered data. Data linkage presents a number of advantages: One of them is to reduce the duplication of data collection; a second one is to create new analytical strategies by taking information that is already available through different kinds of registers. Relying on registered data would reduce measurement error and biased memory and would increase the quality of the data for objective data that are more sensitive and subject to individual interpretation. For instance, questions related to income, tax, insurance, or educational and professional trajectories might be more precise through registered information than through individual answers. The major consequences of data linkage are a better quality of the data and the possibility to reduce the questionnaire size, so that only questions are asked that would not have been available through other data sets. The synergies created by data linkage would then provide the possibility to target mainly attitudinal and subjective behavioural information and reduce the duplication of data.

However, the main difficulty of data linkage is to comply with existing procedures and legislation of data protection, security, data access and data archiving. This difficulty is a challenge but also an opportunity: In this context, the SHP will take part in the development of a coherent and respectful framework within which data linkage can become a useful tool for researchers.



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For 20 years, the Swiss Household Panel (SHP) survey has been examining the living conditions of the resident population in Switzerland. This unique longitudinal survey provides researchers with high quality data across a wide range of fields such as demographics, education, employment, income, health, social indicators, quality of life and attitudes. This makes the SHP a valuable source of information for studies in different disciplines and allows for cross-domain analyses. In addition, the SHP is integrated in the Cross-National Equivalent File (CNEF), which provides harmonized data from eight household panel surveys worldwide that allow for cross-country comparisons.

This information brochure depicts on various achievements of the SHP and provides a set of illustrations of the value of the SHP and its possible applications. Longitudinal surveys are crucial for a better knowledge of the origins, dynamics, inertia and results of social processes. Only longitudinal analyses contribute to an in-depth understanding of the lives and diversity of experiences of individuals living in Switzerland, both over time and across generations. The SHP is a key survey to help informing and evaluating long-term policy decisions in diverse areas such as living conditions, health, education, or professional training.

