



Swiss Household Panel User Guide SHP_IV Pilot (2018 - 2019)

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1 INTRODUCTION

1.1 Aims and Analytic Potential

In preparation of the next refreshment sample of the Swiss Household Panel (the SHP_IV, to start in 2020), the SHP ran a two-wave pilot study in 2018 and 2019 to test alternative modes of interviewing. Advances in information and communication technologies and the increasing use thereof, suggest that web-based data collection offers a particularly promising alternative to telephone in the Swiss context. However, differences between CATI and web are large in terms of interviewer presence, interview pace, and the channels of communication used (oral or visual) (Couper 2011), meaning the comparability between the modes should be evaluated.

Also, the SHP is considering recruiting a refreshment sample in a different mode than the one used until now, which for large-scale household panel surveys has not yet been tested. It is often assumed that web mode would be inappropriate for panel recruitment purposes (Tourangeau 2017) because of its typically lower response rates, but it is unclear whether this argument still holds in the context of a panel recruited by telephone.

To test the ways in which offering web as an alternative mode affects response rates, sample composition and measurement, the SHP mounted a two-wave pilot study, incorporating a mixed mode experiment in 2018-2019. The aim was to compare the standard SHP CATI-based fieldwork (and recruitment) strategy with two online alternatives: a mixed mode (telephone for the HRP interview plus web for individual household members) group and a web-only group (see Voorpostel et al., in press).

Now the pilot study is completed, the data will be made available to SHP data users. These data are especially suited to answer methodological research questions related to interview mode in household panels. As the study is based on a stratified random sample and uses the complete SHP questionnaires, the data can also be used for substantive analysis. It is important to note, however, that the weights provided with the data do not weigh for the mode of data collection and the sample of the pilot cannot be easily combined with the main samples of the SHP.

For detailed information on the questionnaire and the general design of the Swiss Household Panel we refer the reader to the main SHP User Guide (<https://forscenter.ch/projects/swiss-household-panel/documentation/>).

1.2 Access to the data and data protection rules

The SHP_IV pilot data are available at no charge through FORSbase. Users must sign a user agreement to get access to the data. The procedure is explained on the SHP website, with a link to FORSbase:

<https://forscenter.ch/projects/swiss-household-panel/data/>

Access to the SHP data is only granted for non-commercial purposes. It is strictly forbidden to attempt to identify particular households or individuals and to make parts or all of the data available to a third party. In a research team, all users have to sign the contract individually. SHP data users commit themselves to sending a copy of all working papers, final reports or publications to the SHP (swisspanel@fors.unil.ch).

1.3 Getting more information

Questions? Please refer to the SHP User Guide of the main SHP study on <https://forscenter.ch/projects/swiss-household-panel/documentation/>, visit our website www.swisspanel.ch or contact the SHP at: swisspanel@fors.unil.ch.

For specific questions on the design of the SHP_IV pilot please contact Marieke.Voorpostel@fors.unil.ch.

2 STUDY DESIGN

2.1 General design of the SHP

The SHP is an indefinite life (simple) panel, i.e. the same persons and households are interviewed annually. At present, the SHP comprises three samples drawn by the Swiss Federal Statistical Office: the SHP_I (the sample of households and individuals interviewed for the first time in 1999), the SHP_II (interviewed for the first time in 2004) and the SHP_III (interviewed for the first time in 2013).

The SHP collects information at the household and the individual level, using three types of questionnaires: a household grid questionnaire to assess the household composition (lasting less than 10 minutes), a household questionnaire (lasting 15 minutes on average) and an individual questionnaire (lasting around 35 minutes). All individuals aged 14 or more (living in the household) are eligible to complete the individual questionnaire. The household questionnaire includes in addition a proxy questionnaire on household members younger than 14 years, household members who are absent for a long period, or who are unable to respond due to illness or disability.

2.2 Sample structure

2.2.1 Sampling frame

The sample for the SHP_IV pilot is a stratified random sample of private households whose members represent the non-institutional resident population in Switzerland. For the purposes of the study, the Swiss Federal Statistical Office (SFSO) provided a random probability sample of 4195 adult individuals in each of the seven major statistical regions of Switzerland from the SRPH (Stichprobenrahmen für die Personen- und Haushaltserhebungen). The SRPH consists of data coming from the cantonal and communal register of residents and is owned by the Swiss Federal Statistical Office. As this sampling frame is on an individual basis, the selection units were individuals.

The sampling frame contains a small number of socio-demographic variables on all sampled individuals as well as on their household members. For the majority of households the sampled individual was approached first as a household reference person unless the sampled person was a young adult presumably living with their parents. In these cases, he or she was replaced by one of the presumed parents as the first point of contact in the household on the assumption that the latter would be better able to complete the household questionnaire, once the grid was completed.¹

¹ Within households, members were free to later select an alternative household reference person than the one initially approached.

2.2.2 Sampling design

The sample is stratified by major geographic region (NUTS II), in proportion to the number of individuals per stratum. The selection did not take into account the average number of persons in households per region. Within one major region, each individual had the same inclusion probability.

The addresses of the gross sample are distributed according to the following proportions (STATPOP 2015):

Table 2.1 Stratification of gross sample

Strata	Cantons ^a	Proportion of addresses (%)
Lake Geneva region	VD, VS, GE	18.78
Mittelland	BE, FR, SO, NE, JU	22.17
North-west Switzerland	BS, BL, AG	13.69
Zurich	ZH	17.99
Eastern Switzerland	GL, SH, AR, AI, SG, GR, TG	13.75
Central Switzerland	LU, UR, SZ, OW, NW, ZG	9.31
Ticino	TI	4.31
Total		100

2.2.3 Coverage

The sampling frame includes all individuals living in private households in Switzerland, independent of the availability of a telephone connection.

The SRPH is updated every three months by the communities and cantons. The entries are thus not based on the entry of a phone directory, but on the register in the municipality or the canton. Although undercoverage or overcoverage can still occur, they are negligible.

2.3 Treatment groups and survey modes

The households of the sampled individuals were randomly assigned to one of three treatment groups for the first wave: a control group, a mixed mode group and a web group. In the second wave, households repeated the same design, except that 30% of the mixed-mode group of wave 1 was switched to the web group in the second wave.

2.3.1 The control group

In the control group (790 households), the design was as similar as possible to the current SHP, thus the dominant mode of data collection was telephone interviewing. The SFSO delivered a telephone number for 60% of the households. Households without a known landline number were sent an invitation letter asking them to communicate a telephone number. If the fieldwork agency could not obtain a telephone number, the household was assigned to a face-to-face interviewer. At the start of the fieldwork, 29% of households in Group 1 were allocated to face-to-face interviewers (some of these cases were later referred to telephone interviewers, where telephone numbers were subsequently obtained). Sampled individuals received a mailing inviting them to participate in the study with a cash incentive of Sfr.10 and were contacted by telephone (or face-to-face) to complete the grid and household questionnaire. Refusals on the house-

hold level were re-contacted by telephone if a number was available. In a second stage, all eligible household members received a personal invitation to participate in the study with an incentive of Sfr.10. If a household reference person completed the interview by telephone, household members could respond to the individual questionnaire by phone or by web. Household members could only participate in a face-to-face interview if the reference person was also interviewed in this mode. Reluctant and refusing household members were given the option to complete the questionnaire online.

2.3.2 The mixed-mode group

The mixed-mode group (2192 households) followed the current design of the SHP for the household level, and included web only on the individual level. The main idea behind this approach was to recruit the households offline, and then move the second part of the data collection online. Hence, in the mixed-mode group the recruitment was done by telephone or face-to-face. At the start of the fieldwork, 31% of the households were allocated to a face-to-face interviewer.

Households in the mixed-mode group received a request for one person to participate in a short 15-minute interview to complete the grid and household questionnaire, and in a second step, each adult in the household was invited to complete an online individual questionnaire. If a household agreed to participate in the study, the interviewer continued with the grid and, once the household reference person was established, the household questionnaire. All household members, including the reference person, subsequently received a letter with login details inviting them to complete the individual questionnaire by web. If an individual was not willing or able to participate online, the interviewer conducted the interviews by telephone or face-to-face (depending on the mode used for the household questionnaire). Hence, a combination of modes within households was possible, but also rather exceptional.

Of the sample that completed the grid in Wave 1, 30% was switched to the web group in Wave 2. The selection was made at random from households that completed the individual questionnaire online in the first wave.

2.3.3 The web group

In the web group (1213 households), we tested a fully online design in which household members were asked to complete the grid, household questionnaire and individual questionnaires online. In a first step, the sampled individual received a letter inviting them to participate in the study with login details and a cash incentive of Sfr.10 (the letter also mentioned they could contact the fieldwork agency to request a telephone interview if so desired). Nonrespondents received two reminders two weeks apart, and those with a known landline number were re-approached by telephone for a CATI interview. After the grid and household questionnaire was completed, all eligible household members received a letter inviting them to complete the individual questionnaire by web with login details and an incentive of Sfr.10.² Household members without a known telephone number received two reminders by mail. If a telephone number was available, the

² In Wave 1 also the reference person received a separate mailing for the individual questionnaire. In the second wave the reference person could continue immediately with the individual questionnaire upon completion of the household questionnaire.

household member was approached by phone for a telephone interview after one reminder.

2.4 Follow-up procedure

All households that completed at least the grid in the first wave and that did not request to be dropped from the study were re-approached in wave 2 (N=2131). Households that were not reached at all during the first wave or those that did not supply any information at the time of the first wave were not included in the panel in later waves.

Household splits and household members leaving/arriving in the household.
Death, emigration, institutionalisation

2.5 Questionnaires

The questionnaires include the household grid to assess the composition of the household, a household questionnaire to be completed by the household reference person, a proxy questionnaire to get basic information on household members not eligible or absent (completed by the reference person), and individual questionnaires to be completed by all eligible household members. The questionnaires used in the SHP_IV pilot are identical to those used in the main SHP study. This means that in the first wave the modules Politics and Social participation were included, and in Wave 2 the modules Religion and Psychological scales.

More information on the content of the questionnaires is available in FORSbase:

<https://forsbase.unil.ch/project/study-public-overview/15632/0/>

3 FIELDWORK

3.1 Approaching the participating households

The fieldwork took place between January 25 and March 18 2018 (Wave 1) and between January 8 and March 19 2019 (Wave 2). A detailed description of the different phases of the fieldwork for all groups in both waves are provided in tables X and X.

Table 3.1. Fieldwork procedure in Wave 1

	Control group (N=790) CATI/CAPI	Mixed-mode group (N=2'192) CATI/CAPI/CAWI	Web group (N=1'213) CAWI
1	Preliminary letters to contact person including 10.- francs incentive.	Preliminary letters to contact person including 10.- francs incentive.	Preliminary letters to contact person including 10.- francs incentive and login details for grid and household questionnaire.
2	Contact household by CATI or CAPI. Completion of grid and household questionnaire.	Contact household by CATI or CAPI. Completion of grid and household questionnaire.	Interviews by CATI if requested by the respondent by contacting the hotline.
3	Completion of individual questionnaire with the reference person as well as with other household members (if possible)	Completion of individual questionnaire with the reference person by CATI upon request. For CAPI and if household members do not wish to participate by web, individual interviews can also be conducted by telephone if a telephone number is available. Otherwise, appointments made for interviews.	In case of nonresponse, a reminder to complete the grid and household questionnaire is sent after two weeks.
4	Completion of individual interviews with household members by CATI or CAPI		In case of nonresponse a second reminder is sent after two weeks.
5	Refusal conversion grid by CATI at least two weeks after refusal and after sending a letter announcing the new contact.	Refusal conversion grid by CATI at least two weeks after refusal and after sending a letter announcing the new contact.	Refusal and noncontact conversion grid by CATI for the addresses with telephone number, with individual questionnaire by CAWI. For the others a third reminder with login details.

6	<p>CATI addresses: letters to eligible household members with a 10.-francs incentive (including to the reference person).</p> <p>CAPI addresses: interview with household members or appointment. Incentives given at first visit.</p>	<p>Letters to eligible household members with a 10.- francs incentive (including to the reference person) and with login codes for individual web questionnaire.</p> <p>If household members expressed preference to be interviewed by CATI or CAPI the letter was the same as for the control group.</p>	<p>Letters to eligible household members. With a 10.- francs incentive (including to the reference person) and with login codes for individual web questionnaire.</p>
7	CATI or CAPI interviews (individual questionnaires) with eligible household members.	Reminder letter after 10 days.	Reminder letter after two weeks.
8	Refusal conversion individual questionnaires by CATI at least two weeks after refusal and after sending a letter announcing new call.	Second reminder letter about two weeks after the first if no telephone number available.	Second reminder letter about two weeks after the first if no telephone number available.
9		Nonresponse conversion individual questionnaires by CATI if telephone number available.	Nonresponse conversion individual questionnaires by CATI if telephone number available.

Table 3.2. Fieldwork procedure Wave 2

	Control group (N=434) CATI/CAPI	Mixed-mode group (N=807) CATI/CAPI/CAWI	Web group (N=956) CAWI
1	Preliminary letters to contact reference person including 10.- francs incentive.	Preliminary letters to reference person including 10.- francs incentive.	Preliminary letters to reference person including 10.- francs incentive and login details for grid, household and individual questionnaire.
2	Contact household by CATI or CAPI. Completion of grid and household questionnaire.	Contact household by CATI or CAPI. Completion of grid and household questionnaire.	Interviews by CATI if requested by the respondent by contacting the hotline.
3	Completion of individual questionnaire with the reference person as well as with other household members (if possible)	Upon request, completion of individual questionnaire with the reference person by CATI. For CAPI and if household members do not wish to participate by web, individual interviews can also be conducted by telephone if a telephone number is available. Otherwise, appointments made for interviews.	In case of nonresponse, a reminder to complete the grid and household questionnaire is sent after two weeks.
4	Réalisation des interviews individuelle en CATI ou CAPI		In case of nonresponse a second reminder is sent after two weeks.

5	Refusal conversion grid by CATI at least two weeks after refusal and after sending a letter announcing the new contact.	Refusal conversion grid by CATI at least two weeks after refusal and after sending a letter announcing the new contact.	Refusal and noncontact conversion grid by CATI for the addresses with telephone number, with individual questionnaire by CAWI. For the others a third reminder with login details.
6	CATI addresses: letters to eligible household members with a 10.-francs incentive (but not to the reference person). CAPI addresses: interview with household members or appointment. Incentives given at first visit	Letters to eligible household members with a 10.- francs incentive (except to the reference person) and with login codes for individual web questionnaire. If household members expressed preference to be interviewed by CATI or CAPI the letter was the same as for the control group.	Letters to eligible household members. With a 10.- francs incentive (except to the reference person) and with login codes for individual web questionnaire.
7	CATI or CAPI interviews (individual questionnaires) with eligible household members.	Reminder letter after two weeks.	Reminder letter after two weeks.
8	Refusal conversion individual questionnaires by CATI at least two weeks after refusal and after sending a letter announcing new call.	Second reminder letter about ten days after the first if no telephone number available.	Second reminder letter about ten days after the first if no telephone number available.
9		Nonresponse conversion individual questionnaires by CATI if telephone number available.	Nonresponse conversion individual questionnaires by CATI if telephone number available.

4 DATA QUALITY

4.1 Response rates and attrition

Table 4.1 shows the response at the household level in the first wave for the three groups. With regard to mode of completion, by design, the control group and the mixed-mode group are comparable, relying predominantly on telephone. Still about 14% (control group) and 15% (mixed-mode group) completed this part of the survey face-to-face. In the web group, the mode was mostly web, although still 15% completed the grid questionnaire by telephone. Response rates to the grid questionnaire did not vary much between groups (53%-54%) and for the most part, when the grid was completed the household questionnaire was completed as well. This difference between grid and household questionnaire completion was largest in the web group (6% lower response rate to the household questionnaire than to the grid).

Table 4.1. Participation by mode on the household level (Wave 1)

	Control group (790 households)		Mixed-mode group (2192 households)		Web group (1213 households)	
	Grid	Household question- naire	Grid	Household question- naire	Grid	Household question- naire
Completed by telephone	371	363	982	970	92	88
Completed face-to-face	58	54	171	169	-	-
Completed by web	-	-	-	-	509	486
Completed total	429	417	1153	1139	601	574
Response rate (completed/sample*100%)	54%	53%	53%	52%	53%	47%

Table 4.2 shows the number of eligible household members according to the completed grids, and how many of them completed an individual questionnaire (and in which mode). Response rates on the individual level were highest in the control group (69%), followed by 67% in the mixed mode group and 62% in the web group. Of all completed individual questionnaires, 85% was administered in the main mode of telephone in the control group. In the mixed-mode group 88% completed the questionnaire by the main mode of web. This was 90% in the web group.

Table 4.2. Participation by mode on the individual level (Wave 1)

	Control group	Mixed mode group	Web group
Eligible individuals in completed grids	1027	2699	1425
Completed by telephone	603	195	87
Completed face-to-face	65	24	-
Completed by web	39	1579	792
Completed total	707	1798	879
Response rate (completed/individuals (grid)*100%)	69%	67%	62%

For the analytical potential of the data it is important to have complete information of a household: a completed grid, household questionnaire and at least one individual questionnaire. Table 4.3 shows that the control group is most successful herein: for 90% of completed grids there is a household questionnaire and at least one individual questionnaire completed. This is only 81% in the mixed-mode group and 78% in the web group. This means that for 22% of the grids completed in the web group, there is no information on the individual level collected (this is 19% for the mixed-mode group and 10% for the control group).

Table 4.3. Participation on household and individual level combined (Wave 1)

	Control group		Mixed-mode group		Web group	
	N	% of completed grids	N	% of completed grids	N	% of completed grids
Grid, no individual questionnaire	44	10%	218	19%	133	22%
Grid, household and at least one individual questionnaire	385	90%	935	81%	468	78%
Mean individual questionnaires per completed grid	1.87		1.94		1.89	

As in Wave 1, also in Wave 2 response rates on the household level are quite comparable between treatment groups (see Table 4.4), between 75% for the mixed-mode group that was moved to the web group to 78% for the control group. In the control group 91% of the grids were completed by phone, this was 92% in the mixed-mode group. In the mixed-mode group that was moved to web 86% completed the grid online. In the web group this was 80%. On average per completed grid there were 1.87 individual questionnaires completed in the control group, 1.94 in the mixed mode group and 1.89 in the web group.

Table 4.4. Participation by mode on the household level (Wave 2)

	Control group		Mixed mode group		Mixed mode group moved to web		Web group	
	Grid	Household questionnaire	Grid	Household questionnaire	Grid	Household questionnaire	Grid	Household questionnaire
Hlds re-approached in W2	422		788		338		583	
Newly formed households	12		19		16		18	
Total households in W2	434	434	807	807	354	354	601	601
Completed by telephone	305	300	571	571	35	34	92	92
Completed face-to-face	32	32	51	49	1	1	0	-
Completed by web	-	-	1	1	229	228	369	367
Completed total	337	332	623	621	265	263	461	459
Response rate (completed/total*100%)	78%	77%	77%	77%	75%	74%	77%	76%

On the individual level (Table 4.5) we see that the response rate was highest in the web group (76%), followed by the mixed-mode group that went to web (75%). Response rates in the control group were 73% and in the mixed-mode group 72%. In the control group 81% of the questionnaires was completed by telephone. The main mode in the other three groups was web and was used for 77% of individual questionnaires in the mixed-mode group, 94% in the mixed-mode group that was switched to web and 88% in the web group.

Table 4.5. Participation by mode on the individual level (Wave 2)

	Control group	Mixed mode group	Mixed-mode group switched to web group	Web group
Eligible individuals in completed grids	786	1392	611	1059
Completed by telephone	460	181	28	94
Completed face-to-face	47	49	1	-
Completed by web	63	776	431	713
Completed total	570	1006	460	807
Response rate (completed/individuals (grid)*100%)	73%	72%	75%	76%

In Table 4.6 we see that the average number of individual interviews per completed grid is quite comparable to Wave 1 and comparable between treatment groups (between 1.82 in the web group and 1.85 in the two mixed-mode groups). Whereas in Wave 1 there were quite some grids without individual questionnaire, this was reduced in Wave 2 in all groups except the mixed-mode group, where still for 13% of the grids no individual questionnaire was completed. This was only 4% in the web group, where in Wave 2

reference persons could immediately fill in the individual questionnaire upon completion of the household questionnaire (in Wave 1 they had to wait for new login details).

Table 4.6. Participation on household and individual level combined (Wave 2)

	Control group		Mixed-mode group		Mixed mode group switched to web		Web group	
	N	% of completed grids	N	% of completed grids	N	% of completed grids	N	% of completed grids
Grid, no individual questionnaire	27	8%	79	13%	17	6%	17	4%
Grid, household and at least one individual questionnaire	310	92%	543	87%	248	94%	443	96%
Mean individual questionnaires per completed grid	1.84		1.85		1.85		1.82	

Table 4.7, finally, shows the longitudinal participation in the study. Of all respondents who completed an individual questionnaire in the control group in Wave 1 73.3% repeated the study in Wave 2. In the mixed-mode group and the web group this was 70.4% and 72.7% respectively.

Table 4.7. Longitudinal participation (individual questionnaires)

	Individual questionnaire in W1 and W2	As % of W1 individual questionnaires
Control group	518	73.3%
Mixed-mode group	1267	70.4%
Web group	639	72.7%
Total	2424	71.6%

4.2 The weighting scheme of the SHP

The weights for the SHP_IV pilot data are constructed in a similar way as for the main SHP samples. For a detailed description of the procedure we refer the SHP User Guide. It is important to note that the weights for the pilot data do not take the mode into consideration.

Table 4.8 List of weights, variable names and description

Types of weights	Variable name	Description
Longitudinal weights		
SHP_IV pilot Individuals	WI18LP17P	Weights for longitudinal individuals expanded to the resident Swiss population of 2017
	WI18LS17P	Weights expanded to the sample size of longitudinal adults in the “panel” starting at year 2017
Cross-sectional weights		
SHP_IV pilot Individuals	WI17CSPP	Weights expanded to the resident Swiss population of current year
	WI18CSPP	
	WI17CSSP	Weights expanded to the sample size
	WI18CSSP	
SHP_IV pilot Household	WH17CSPP	Weights expanded to the resident Swiss population of current year
	WH18CSPP	
	WH17CSSP	Weights expanded to the sample size of the panel
	WH18CSSP	

5 DATA DOCUMENTATION

5.1 Data files

Table 5.1 gives an overview of the different data files included in the release of the SHP_IV pilot data. All files are available in SAS, Stata³ and SPSS format.

Table 5.1 Overview of files in the SHP_IV pilot

File name	Title	Content
SHP_IV_PILOT_MH	Master household file	Response status of all households that have been in the panel in any of the two waves.
SHP_IV_PILOT_MP	Master person file	Response status of all eligible household members that have been in the panel in any of the two waves.
SHP_IV_PILOT_H_W1	Annual household file W1	Household level data collected in Wave 1
SHP_IV_PILOT_H_W2	Annual household file W2	Household level data collected in Wave 2
SHP_IV_PILOT_P_W1	Annual person file W1	Individual level data collected in Wave 1
SHP_IV_PILOT_P_W2	Annual person file W2	Individual level data collected in Wave 2
SHP_IV_PILOT_SO	Social origin file	Information on characteristics of the parents when the respondent was 15 years old. All individuals who completed an individual interview in W1 or W2 are included (aged ≥ 20 and not living with parents).
SHP_IV_PILOT_LJ	Last job file	Information on the last job of all individuals who were inactive at the time of their first interview.
SHP_IV_PILOT_CA	Employment calendar	Monthly employment situation for the twelve months prior to the individual interviews of both waves.

For the complete questionnaires see “Questionnaires” under “Documents” on FORSbase (<https://forsbase.unil.ch/project/study-public-overview/15632/2/>).

³ Please note that Stata is case sensitive and that Stata data file names are in lower-case.

5.2 Constructed variables

For a description of all constructed variables we refer to the SHP User Guide W20 (<https://forscenter.ch/projects/swiss-household-panel/documentation/>).

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