PART THREE
Guidelines for Survey Fieldwork and Panel Maintenance

Andrej Kveder

1. Fieldwork Guidelines

The purpose of these guidelines is to provide standard solutions to some of the open questions regarding the fieldwork of a Generations and Gender Survey (GGS). They are meant as a collection of good practices that are deemed helpful for organizing survey fieldwork. The two main issues in these guidelines are interviewer training and contacting procedures.

1.1. Interviewer training

Although interviewer training varies across countries, part of it can be standardized to maintain comparability of data collected with different fieldwork procedures. The proposed standardization of interviewer training mainly focuses on the interviewer's conduct, presentation of the survey, and some interviewing techniques such as probing. Some related topics are discussed in the section on contacting procedures.

1.1.1. Before first contact

When preparing for fieldwork, the interviewer should focus on the presentation of the survey and basic introductory tactics. He or she should fully understand the requirements of the interview and be familiar with the content of the questionnaire. A standard introductory script should be prepared for actual use in the field. This includes the introduction of the interviewer. He or she introduces him/herself giving the full name and affiliation to the fieldwork organization. This kind of introduction is used whenever contact is attempted with the target household. The interviewer should have a valid ID card with a photo and his/her name and organization clearly visible. In some cases, the interviewer can also give a special credibility letter that links him/her to the survey he or she is introducing.

The second part of the introductory script includes a brief and easy–to-understand description of the survey. The interviewer should be thoroughly briefed on the objective of the survey, so that he or she can explain it to the respondent. The standard description of the survey is supposed to be neutral. When the contacted individual is faced with the request to participate, he or she will consider the arguments to do so. One of the important factors regarding the decision to participate is interest in the survey topic and its perceived importance. The way the survey is presented to respondents can thus have an influential effect on their response. For example, overemphasizing family and fertility issues in the description of the GGS could result in a higher refusal rate among men than among the women.

1.1.2. First contact

Part of the interviewer training should be devoted to one's behaviour upon first contact with a potential respondent. This part of the training focuses mainly on dealing with the reluctant or refusing respondent. Specific training should be prepared for a "foot-in-the-door" situation, accompanied with prepared scripts of interviewer conduct. The interviewer should possess techniques for preventing "denial of entry" by quickly reacting to the respondent's rebuts and politely stay in the doorway and continuing with his/her persuasion. These scripts should offer the interviewer various possibilities to react to the respondent's comments, questions or concerns. The scripts are usually based on previous good experience. The interviewer should be trained in the effective use of these scripts. He or she needs to learn how to observe the respondent and the surroundings, and to react accordingly.

Additional training in those techniques can be arranged for a special group of experienced interviewers who act as refusal converters. These interviewers try to deal with initially refused participation and to convert the refusers into respondents. Refusal conversion must be approached with caution. In some countries, it is not even considered as acceptable conduct. Where it is, however, some refusal conversion training is highly desirable.

1.1.3. Conducting the interview

Training, conduct during the interview, and interaction with the respondent should be included in preparations to the survey. It is recommended that this kind of training be performed in a practical role-playing exercise that considers the various situations that may come up in between the interviewer and the respondent.

Interaction between the interviewer and the respondent needs to be balanced between two principles. On the one hand, it has to be standardized; on the other, it must allow for relaxed communication. Standardization of the interaction implies that:

- The interviewer poses the questions with exactly the same wording as written in the questionnaire;
- If the question is not correctly understood, the interviewer merely repeats the question as written in the questionnaire;
- Probing is strictly scripted.

Most often, the interaction between the interviewer and the respondent aims at a high standardization in order to minimize the influence of characteristics of an interviewer on the answers provided. Interviews with highly standardized interaction tend to produce data of higher quality and comparability, as all the interviewers interact with the respondents in much the same way.

However, high degree of standardization may also cause some respondents to refuse an answer, and a very rigid posing of questions can lead to very rigid and limited answers. If the respondent perceives the interaction as too rigid, he or she could choose not to respond to the question or will choose not to invest additional effort in seeking the answer. To illustrate such a situation, consider the following example: the respondent does not understand the question, which the interviewer is not allowed to clarify due to the script, or he or she cannot choose an appropriate answer on the answer scale provided. Therefore, the respondent is not providing an answer.

A high standardization of the interaction between the interviewer and the respondent may also lead to a significant drop in the cognitive effort by the respondent, who might start looking for the easiest and quickest conclusion of the interview instead of providing the requested information. The training sessions should show this dilemma between the very strict and standardized communication scripts and more relaxed ones, considering that more relaxed scripts may lead to biased and less comparable information.

In the process of enforcing the standardized way of interviewing, the interviewers should tactfully lead respondents back to the relevant topic if the answers drift astray. Questions on potentially awkward issues, such as divorce or death of a spouse, should be raised tactfully, encouraging the respondent to provide accurate information.

The GGS is a standardized interview which aims at a very high comparability of international data. Therefore, any deviance from a strict standardization should be very carefully prepared and included in the interviewer training so as to secure a high level of data quality.

Event histories require specific attention from the interviewer. In answering these questions, the respondent needs to recall the timing and sequencing of various life experiences, which may be difficult. The interviewer should pay close attention to the consistency and accuracy of the reported timing of events and be able to help the respondent overcome recall difficulties. Probing techniques used for this include reiterating the question and explaining the mentioned concepts, if necessary. Probing instructions and training can be done simultaneously with the training on use of the survey questionnaire. Interviewers should receive uniform instructions on probing.

1.2. Contacting procedures

Training on contacting procedures needs to begin with introducing the basic terminology. In most cases, the contact information, such as address or the phone number, pertains to a household. In this case, the sampling-unit is a household and the within-household selection of the target individual still has to be carried out. This person is defined as the target person. If the sampling unit is an individual, then this person is already known.

Contact is an attribute of a survey where an interviewer enters a conversation with one of the members of the target household. This person is denoted as the contact person. The contact person is not necessarily the target person. The interviewer needs to ascertain the position of the contact person in the household. During the contact, information is gathered about the household as well as about the target person. This information is of great importance for conducting the interview or for any further contact attempts if the target person is not present or available. Success with obtaining consent for the interview depends in large measure on the first contact.

1.2.1. Preparing for the first contact

Scientists and survey practitioners have a variety of opinions about the kind of approach that maximizes success in the first contact. A contacting protocol is usually tailored to the survey it is meant to serve, to the specifics of the target population, and to the legal requirements of the country or region where the survey is being carried out.

1.2.1.1. Informed contact or cold contact

A strategic decision about the first contact is whether it should be a so-called cold contact or an informed contact or call. The cold contact implies that no prior information about the survey is shared with the potential respondent or any member of the target household. The strategy of the cold first contact builds on the previously mentioned "foot-in-the-door" approach. The interviewer builds on the surprise of the contacted person in the household and tries to persuade the member of the household to hear him/her out and only then decide whether he or she wants to participate. The surprise can be very effective since the potential respondent has not been prepared to rebuff the well-prepared interviewer and finds it comfortable to agree to the interview. The interviewer should behave tactfully, to prevent potential respondents from perceiving this attempt as an invasion of privacy.

The contact attempt is considered informed when some information is distributed in advance. The information provided prior to attempted contact has mainly positive effects, since it makes potential respondents aware of the survey's goals and the importance of participating. Furthermore, the main persons and organizations responsible are presented and this gives the survey the necessary credibility. However, information about the intended contact can also be counterproductive, since individuals choosing not to participate have the opportunity to prepare a script for rebutting the attempts of the interviewer. As a general recommendation, in surveys such as the GGS, informed first contact is preferred.

The *advance letter* is the most common form of informing potential respondents prior to the first contact. It usually informs the potential respondent about the survey and about the anticipated visit by the interviewer.

An effective advance letter is preferably short, not exceeding one page, well structured and written in a clear and non-technical language. It should emphasize the importance of participation as well as of the right to refusal. It should also be written in a way that raises positive interest in the survey.

The advance letter should offer a short presentation of the survey and the possible implementation and use of its results. Mentioning international cooperation and broader implication is a good way to put more weight on the importance of the programme. The description of the survey can also anticipate a list or short description of the topics covered by the questionnaire. However, the level of detail given has to be thoroughly considered, since too detailed description may lead to non-random attrition. Certain topics are more appealing to some people than others. For example, family and fertility topics may cause a larger proportion of refusals among men, while political discussion may have a similar effect among women.

The middle section of the advance letter should inform the respondent how and why he or she was selected for the participation in the survey. The description of the sampling procedure should be most elementary, with an emphasis on two issues: randomness of selection and representativity. The individual's participation is deemed as crucial to the survey, since he or she represents many persons with characteristics close to his/hers. Attention must be paid to assuring the respondent that the data collected will be treated confidentially. In a panel survey such as the GGS, this aspect is especially important, because the details necessary for contacting the respondent again in subsequent panel waves has to be taken down.

Information about the rights of the selected individual to refuse either to participate or to answer particular survey questions can be included. The letter should also include a brief description of the contacting and interviewing process. The potential respondent should be notified that the interviewer will attempt to contact the household.

It can be useful to share a success story with the potential respondent. An encouraging statement, e.g. that most people taking part in the study find it an interesting and enjoyable experience, can reassure the individual that participating could also be fun.

The letter should provide contact details of the fieldwork organization responsible for the survey, so that a respondent can easily obtain more information about the survey. The accessibility of such information is helpful in terms of reassuring respondents of the legitimacy of the endeavour.

1.2.1.2. Face-to-face contact or telephone contact

Another strategic decision on the initial contact pertains to its mode: face-to-face or telephone. In some countries, telephone contact may be impractical because of the lack of telephone coverage[6] or the poor state of the telephone network. In other countries, a large proportion of unlisted telephone numbers may prevent use of this option.

First contact over the phone saves time and travel costs. Furthermore, telephone contact enables the interviewer to bypass impediments such as fences, locked front doors, house phones, dogs, etc. A telephone call can also perceived as less of an intrusion than a personal visit, which can be a factor vis-à-vis agreement to participate.

On the other hand, one disadvantage of a first contact by telephone is the limitation of interaction to the audio: the interviewer cannot use any visual cues. In such a less personal encounter, it may be easier to refuse participation.

1.2.1.3. Recommendations

The recommendation for the GGS is to use the informed first contact strategy, preferably with an advance letter. In addition to this personal notification, it can be beneficial to provide information about the survey through mass media, including interviews with representatives of the research community and government agencies.

In some sample designs, an advance notification cannot be used due to the nature of the sampling procedures. Of such designs, area samples and random route sampling are the most frequently used. In these cases, the interviewer should be provided with additional information that could be shared with the potential respondent upon the initial contact. Such additional information can be in the form of a leaflet or letter explaining the survey and the respondent's role. In the case that the contact person is unwilling to accept the interviewer's visit, he or she has the options of offering any information he or she possesses for study or making an appointment for a later time.

For the purposes of the GGS, it is recommended to make first contact over the phone. In countries where this is not possible, first contact needs to be made face to face.

1.2.2. Contacting procedures

Effective scheduling of contact attempts is an important organizational aspect of fieldwork. The scheduling is considered effective when the interviewer achieves higher cooperation rates with as few contact attempts as possible. In other words, the interviewer has to schedule his/her contact attempts so as to maximize chances of success with every attempt he or she makes.

Effective scheduling of contacts has at least three great benefits. First, the work of the interviewer is well planned so as to make the best use of time; second, fewer contacts per accomplished interview reduces survey costs; and third, optimization of contact attempts leads to higher cooperation rates.

At first glance, such optimization may seem difficult; however, some relatively simple and effective methods exist. Simpler methods can be used by the interviewers themselves without any prior special know-how or additional technology. These simple but still effective approaches are discussed below.

In a cold contact, the interviewer possesses no prior knowledge when the sampled individual might be at home. As a general guideline, the best times to attempt initial contact are weekends and late afternoons or early evenings on weekdays.

If the initial contact is unsuccessful the interviewer should know how to schedule subsequent contact attempts effectively. He or she must record the at-home patterns of the sampling units, that is, write down the time, outcome and circumstances of the contact attempt. Talking to

[6] The term "telephone coverage" applies to the indicator measuring the proportion of the households possessing a phone connection. Most developed countries have coverage of 95 per cent and above.

neighbours may provide useful information for planning the next contact attempt.

The main strategy of contact scheduling is relatively simple. The interviewer should disperse his/her contact attempts over different times of day and different days of the week, putting emphasis on attempts during the weekend. For example, if the interviewer called the selected contact on a Thursday late in the afternoon, he or she should try to schedule the next attempt in as different time slot, for instance Friday morning or the weekend.

The spacing of the contacts themselves is also important. The contact attempts should not be scheduled close together. As a rule, there should be at most one contact per household per day. It recommended to space visits to more than one day apart.

Planning of contact attempts is very important, as fieldwork usually allows for a certain maximum number of contacts per unit, which helps keep costs down. Beside the maximum, the minimum number of contact attempts must be specified as well. It is recommended to set this minimum at five or higher, depending on the country context and the fieldwork budget. More complex methods of contact scheduling, relying on special software and computer-assisted interviewing (CAI) exist as well.

1.2.3. Recording contact history information

Information on contact attempts should be documented in a standardized way, such as having the interviewer complete and maintain a contact form. A contact form helps the interviewer plan his/her fieldwork activities. It also provides valuable data that can be used for secondary analyses and comparison of fieldwork procedures across countries. The information collected in contact forms can also be used for more effective tracking of respondents for subsequent panel waves.

The first section of the contact form records identification of the potential respondent and the interviewer. Further sections of the form include times and dates, type and outcome of each contact. If the attempt was not successful, the reason should be explained, including “address could not be found” or “nobody living at this address”. Even if the contact person was not the target person, basic information about him/her should nevertheless be recorded. As a minimum, it is recommended to indicate whether the contact person is (a) a resident household member; (b) a non-resident family member, visitor or friend; (c) a neighbour; or (d) a building manager, security guard or other gatekeeper. In the case that the outcome is a refusal, the reason should be specified as to why the contacted person refused. Upon refusal, the interviewer can also provide subjective assessments vis-à-vis the likeliness of future cooperation. This estimation can help the central office decide whether to re-issue the case. In the case of a non-contact, some additional information could be sought through neighbours and recorded on the form for future reference.

Depending on sample design, the interviewer would have to perform additional selection processes, e.g. the selection of one household within a multi-dwelling address or a target person within the household. Procedures for selection should be provided on the contact form to allow the interviewer document the whole selection process. There are various ways to select either a household or a person within the household, but two are most common: the Kish grid and the last birthday method (see Kish 1949 and Salmon and Nichols 1983 for more information on those methods). The Kish grid is recommended for the GGS.

2. Panel Maintenance Guidelines

Every sample survey is faced with the inevitability of experiencing some form of non-compliance with survey requests, resulting in missing information. Complete or partial absence of requested information from a selected sample member (sampling unit, most frequently a household or an individual) is denoted *nonresponse*. A selected sampling unit may fail to participate in the survey due to incomplete or false contact information, which is a situation of a non-contact. A sampled individual may also refuse to participate. In the case of a longitudinal (panel) survey, nonresponse can occur at each wave of data collection and can have a cumulative effect, since more of the sampling units are lost with each consecutive wave. This process is referred to as *sample attrition*.

Attrition can either be non-selective or selective. Non-selective attrition means that respondents are lost randomly with regard to the main characteristics of interest. This is referred to as MCAR – Missing Completely at Random. Such attrition typically can skew or bias estimates. Unfortunately, in practice, attrition tends to be selective, so that the nonrespondents differ from respondents with regard to the characteristics of interest. Such selective or non-random attrition leads to biased estimates and poses a problem for analysis. Evidence across many social surveys shows that older persons, young people, men, high-income individuals, individuals living alone, households with frequent residential moves, and people living in urban areas have a higher probability for attrition.

When talking about panel attrition, we are mostly concerned with the possibility of not being able to re-establish the contact on the next visit to the selected respondent. Refusal is usually of less concern, because respondents have already shown a tendency towards willingness to participate in the survey by responding to the initial or previous survey requests. Temporary absence and moving are the most common reasons for the failure to re-establish contact on a subsequent visit to the selected respondent. Residential mobility of the population under study is likely to have a considerable influence on the rate of non-contact. For example, this is the main reason for the higher attrition rates among young people. Features of survey design, such as the overall duration of the panel and the length of interval between panel waves, also affect the probability of finding the respondent.

To have the highest possible chance of locating a respondent who has moved, the panel sample has to be maintained. Panel maintenance starts with the first interview when the necessary contact information has to be collected. Between panel waves, the survey organization has to engage in maintaining contact with respondents and thus attempt to track their residential moves. If this is unsuccessful, an attempt has to be made to find out the respondent's new address.

2.1. Collecting the contact information

First step to effective panel maintenance is the collection of all relevant contact details necessary for re-establishing contact. These details are usually collected upon successful completion of the first interview.

Collecting information on work is also recommended; however, experience from previous surveys suggests that collecting contact information from only the respondent is insufficient. Additional contact information should be collected from people who could provide information in the case that respondent has moved between the data collection times. This is implemented in the GGS questionnaire. Most commonly, such proxies are family members, relatives and close friends.

The GGS core questionnaire provides the minimum required information needed to trace the respondents. However, a more elaborate approach can improve the probability of re-establishing contact with a given sampling unit. Here are some examples used in the existing surveys on asking the respondents to provide their contact details and those of their relatives or close friends:

-This survey is part of a longer term study to look at the health of Canadians. We will need to re-contact you two years from now.

Contact 1

-Could we have the name, address and phone number of a friend or relative that we could call in case there are difficulties in reaching you? This would only be used to help us contact you.

-How is this person related to you?

Work number

-Could I please have your telephone number at work? This will only be used to help contact you 2 years from now.

-What is the telephone number, starting with the area code?

(Source: National Population Health Survey, Canada)

Expect to Move

-Are you planning to move in the near future?

-What is the new address?

Contact 1

-This survey is part of a longer-term study to look at the experiences of new immigrants to Canada. We would like to follow up with you in a year and a half and find out how you are adjusting to Canada. At that time we will try and contact you at your current address and phone number. However, we would like the name, address and phone number of a friend or relative in Canada we could call ONLY if there are difficulties reaching you.

-What is the telephone number for "contact name"?

-What is the address for "contact name"?

Contact 2

-Is there another friend or relative we could call to help us contact you?

-What is the telephone number for "contact name"?

-What is the address for "contact name"?

(Source: Longitudinal Survey of Immigrants to Canada, Canada)

Contact 1

-In case you move or change telephone numbers, it would be helpful if you could provide the name, address and telephone number of someone, such as a friend or relative, who could help us to contact you. I want to emphasize that Statistics Canada will contact this person only if you move, and then only to obtain your new address or telephone number.

Contact 2

-In case we can't reach that person, we would like to ask for the name, address and telephone number of another person that we could contact.

(Source: National Longitudinal Survey of Children and Youth, Canada)

Recorded contact details from the respondent and those of his/her proxies are used in the main activities of the panel maintenance namely in maintaining the presence and in tracing.

2.2. Keeping in contact with respondents

Continuing the contact between the research organization and the respondent is the cornerstone of panel maintenance. Repeated contacts help the research organization update the respondents' contact details. The contacts should also help motivate the respondents to participate in the future panel waves.

The frequency of such contacts between panel waves should aim to achieve an optimal balance between the need to maintain a positive image of survey and not becoming obtrusive. Contacts can be made personally over the phone or even in a face-to-face visit, but more often this is done by a letter. E-mail and the Web offer additional possibilities. If personal contact is used, it is recommended to use the same interviewer who performed the most recent interview. However, contact by mail is preferred as a less intrusive method. The usual practice is to send mail on the days when it could be welcome and not perceived as an extra burden. Such days may include important holidays such as Christmas, the New Year and the respondent's birthday. The anniversary of the interview could also be considered.

An update form for contact details is usually included in the contact package to remind the respondent to notify the survey organization of moves made or planned. The contact form can be provided in the form of a postcard with a pre-paid postage fee to reduce the respondent burden in completing or sending the information. The form can also provide the respondent with a Web address (URL) to an online form.

The form can be part of an additional way of providing and receiving information such as an interactive Web page, which includes information about the survey, notices and requests. Beside the form for updating contact details, such web page can also provide other features such as forums, FAQs (Frequently Asked Questions) and contact forms which direct the respondent to one of the organization staff to ask concrete questions. For example, such a Web page is used in Hungary, the first country to field the GGS (see http://www.dpa.demografia.hu).

Contact with the respondent is usually re-established relatively soon after completing the interview, to thank the respondent for his/her time and willingness to participate and to emphasize his/her important contribution to the research endeavour. This thank you letter can be accompanied with a small gift, e.g. a calendar with the survey and organization logo, or other small items with logos.

A brief satisfaction questionnaire can also be included in the material for the initial re-contact, to give the respondent the opportunity to provide his/her own views of the interview and satisfaction with it and the contacting procedure (this was used, e.g. in the Hungarian GGS). If dissatisfaction is reported, which will lead to eventual change in the procedures, it is recommended that the survey organization contact the respondent, assuring him/her that actions will be taken to do better next time. This will let the respondent know that his/her participation is highly valued.

When first results of the survey are available, respondents can be re-contacted by a short letter together with a brochure or a booklet with highlights of survey results. This demonstrates that the collected data are actually being used for research and other activities. In this context, participants can also be notified of any public appearance of the research organization's representatives, e.g. TV talk shows, newspaper articles, press conferences, or even workshops or seminars and conferences.

On special occasions such as major national or international holidays and personal anniversaries, a card with best wishes can be sent to the respondents. This token of attention reminds the respondent that he or she is part of a community of survey respondents, and expresses gratitude for his/her contribution.

Sometimes the approaches used to maintain active contact with respondents are unsuccessful, and they cannot be reached when the contact is attempted at the next data collection stage. In such cases, the interviewer or a specially trained professional should attempt to locate the respondent's most recent contact details. Procedures used in such searches are called tracing.

2.3. Tracing

Tracing is the activity used to locate and contact respondents who cannot be reached at the telephone number or address provided at the beginning of a survey or, in the case of longitudinal surveys, their contact information at the time of the previous cycle of the survey. Tracing consists of strategic and logical searches.

In applying various tracing procedures, privacy and confidentiality concerns must be upheld at all times. Only contact information provided by the respondent herself or obtained from publicly available sources should be used. A special body or committee can be established by the survey organization to monitor all tracing procedures, to ensure that privacy is respected and to prevent misuse.

2.3.1. Tracing procedures

2.3.1.1. Easy tracing conducted by an interviewer

When a case resorts to tracing, interviewers have the option of continuing to work on the case. This first step, easy *tracing,* involves contacting easily accessible and readily available sources usually provided by survey organization itself, such as:

- Directories maintained by public or private domain;
- Commercial telephone directories available either on the CD-ROM or other digital media, or online.

2.3.1.2. Difficult tracing conducted by experienced tracer

If the interviewer is unsuccessful in contacting the respondent using easy tracing sources and tools, so-called *difficult tracing* can be done using more complicated tools. Usually, only experienced tracers will be involved. Tools for difficult tracing include:

- Other directories provided in the digital form, which are not so readily available, easily accessible or easy to use;
- Internet directories, where the main concern is the reduction of the vast amount of available information;
- Printed directories, such telephone books (e.g. White pages, Yellow pages, local directories, cross-referenced directories);

- Operator assistance;
- Registers with controlled access, such as the Central Registry of Population.

2.3.1.3. Computer assistance

Software provided for Computer Assisted Interviewing (CAI) offers additional options for tracing purposes such as a special tracing module (e.g. in Blaise[7]), which uses a series of screens to guide interviewers through the tracing process. The Tracing module displays all current information on the selected person, household members and source(s), and contains the tools used to document tracing efforts when trying to locate the selected person.

2.3.1.4. Special tracing procedures

In special cases, the survey organization may acquire permission to use very accurate register information to tracing. The acquisition of such permissions may be difficult, depending on the stipulations on personal data protection in a given country. Obviously, registers can only be used in countries where they exist. Usually, access to the central population register is provided. In addition, sources such as income tax files can be used to trace address and telephone number changes.

[7] http://www.cbs.nl/en-GB/menu/informatie/onderzoekers/blaise-software/default.htm

Strengths and weaknesses of various tracing tools

Tracing tool	Strengths	Weaknesses
Easy tracing (conducted by survey interviewer)		
specialized directories	• Quick • Easy to use • Updated frequently (e.g. monthly or more often) • Can search by respondent name, street name, phone number, city, postal code • The main tracing tool which should resolved the majority of cases	• Can be expensive (e.g. up to $100,000 per year) • May need exact spelling • Addresses not always accurate • No apartment numbers • Not as current as online services or information obtained directly from national phone companies • No indication if number/address is for a private residence, a seasonal dwelling or a business
Commercial phone directories on digital media	• Allows wildcard searches • Provides current and archive information for name, address, telephone number, postal code	• Not always up-to-date
Difficult tracing (conducted by experienced tracer)		
Other phone directories provided on digital media	• Allows complex searches • Provides current and archive information for name, address, telephone number, postal code	• Not always up-to-date
Internet directories	• Used to locate people in the country and worldwide • Offers many search choices	• Access to the Internet may not be available
Printed phone directories	• Easily accessible • Provide current and archive name, address, phone number	• Quickly outdated • Time-consuming • Can be expensive
Operator assistance	• Quick	• Only one number can be given at a time • Must provide exact spelling • Expensive (e.g. in Canada ,50 cents to $1.00 per address)
Municipal offices	• Good for finding landlords and homeowners • Knowledgeable and current	• Not all municipalities are willing to provide this service • Some municipalities could charge fees for inquiries
Respondent contacts (Family, relatives, neighbours, etc.)	• Very good source because based on contact information provided by the respondent in the previous cycle	• Not always available
Maps	• Useful to find address	• Slow
Field trace	• Easy to see if dwelling is occupied or vacant • Easy to talk to household	• Expensive

Source: Statistics Canada

Resources on the web

One of the most comprehensive Web resources on longitudinal surveys is the United Kingdom Longitudinal Studies Centre of the Economic and Social Research Council, which hosts the British Household Panel Survey and information on longitudinal studies in the United Kingdom and elsewhere.

http://www.iser.essex.ac.uk/ulsc

Among the specific resources available through this site, at least two should be highlighted for the purpose of these guidelines:

- "Keeping track" is an up-to-date guide to major longitudinal sources of data.

  http://www.iser.essex.ac.uk/ulsc/keeptrack/index.php

- Links of Longitudinal Survey Resources represent a very useful selection of most prominent longitudinal surveys conducted in the United Kingdom and around the world, as well as to relevant research and a portal site pointing to more resources.

  http://www.iser.essex.ac.uk/ulsc/resources/links/long.php

Some panel studies introduced on the Web:

- Panel Study of Income Dynamics (PSID) is a panel of nearly 8,000 U.S. families followed for almost 40 years. Their website offers access to the data and various substantial and methodological articles.

  http://psidonline.isr.umich.edu/

- The survey *Household, Income and Labour Dynamics in Australia (HILDA)* is a household panel survey that began in 2001 and had six waves since. Their webpage offers various substantial and methodological papers, among them the Wave 2 Survey Methodology technical paper, which talks about the tracing procedures used.

  http://www.melbourneinstitute.com/hilda/

  http://www.melbourneinstitute.com/hilda/hdps/hdps-techn05.pdf

- The Netherlands Kinship Panel Survey is a multi-method multi-actor panel survey with 10,000 respondents. The page offers short descriptions of the survey with a reference list of mainly substantial papers.

  http://www.nkps.nl/NKPSEN/nkps.htm

- British Household Panel Survey (BHPS) began in 1991 and has so far recorded 13 waves of data collection. The page hosts all the methodological information as well as measurement instruments used.

  http://www.iser.essex.ac.uk/ulsc/bhps/

- Survey of Labour and Income Dynamics (SLID) is conducted by Statistics Canada and aims at an understanding of the economic well-being of Canadians. The webpage provides a description of the panel, the methodology used, and access to standard tabulations.

  http://www.statcan.ca/cgi-bin/imdb/p2SV.pl?Function=getSurvey&SDDS=3889&lang=en&db=IMDB&dbg=f&adm=8&dis=2

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