Transcript: SDC-Net final meeting: Decisions, decisions, decisions – survey commissioning in a multi-source, multi-mode world

[0:00:00]

Gabriele Durrant: Right, first of all I would like to welcome everybody to today's meeting, it's fantastic to see so many people here and we've invited a number of people to be part of the panel today. So just to frame this briefly, what's going to happen, so I will just say a few words and then we'll have the sort of main discussion with the panel, and then towards the end, Olga will just say a few words as well, that will be the sort of more general summary of the meeting today. And I just wanted to sort of take the opportunity to, yeah, first of all welcome you to today's meeting, and just to remind ourselves, so basically SDC-Net, so today is the last meeting of that former network, shall I say, so the Survey Data Collection Network in this form. It was obviously funded by ESRC, as you know, and was one under the NCM grant, and everything is on our website under the NCM website. So you can have a look at that, I've put these things here in the slides, and everything will be available obviously from that, from that website. And we also when more reports from this group or sort of online resources become available, then we will make them available on that website, over the next couple of months, there will be more coming up there. Maybe that's all I wanted to say, so we had obviously just briefly reviewing several meetings on various key topics, in fact, for some innovations in survey methods, or survey data collection methods, the future of face to face, we've discussed the role of interviews and so on. And yeah, today's final meeting is looking at the sort of commissioner side. We are obviously very keen to continue with this type of meeting or this type of exchange, and in fact, we are in the process of sorting out, and Olga will say a few more things at the very end of this meeting, funding from the ESRC to continue with part of this work as part of a new funded collaboration, it's called the Survey Data Collection Methods collaboration, and a number of us will be part of this and there will be opportunities to join in the future as well, but Olga will pick that up at the end. So while this is the final meeting under this particular grant, we very much hope that we can continue with a very similar set up in the future. And today's meeting is basically, yeah, looking at various decision making, particularly focusing on the commissioner side, decision making because of, yeah, so commission in the multisource, multimode world effectively, and I would like to hand to Gerry Nicolaas, who will lead us through the panel discussion.

Gerry Nicolaas: So I'm Gerry Nicolaas, I'm Director of Methods at Nat Cen and it's my pleasure to chair and moderate the panel discussion today. Gabby's already mentioned that today's event is focusing on the perspective of those who commission surveys and how they decide on the most appropriate methods and data sources to meet their information needs. We're fortunate to have five very experienced commissioners in, at least I hope there's going to be five of you, because one of them hasn't quite joined us yet. Olga and Gabby, if one of you could let me know when he has joined, because then I will stop and welcome him and introduce him as well. I'm very grateful for you giving up your valuable time to come and join us today, but before I introduce the panel members, I would like to explain the format of the event. So first of all, each panel member will have about five minutes to tell us a bit about the surveys they commission or lead on and how they use the survey data. I'll then ask them a series of questions on the pros and cons of the survey method for their information needs, how they make decisions on the choice of survey

mode, the use of new technologies and the use of other data sources, and also what they as survey commissioners need from us survey providers and academic researchers to help them make better informed decisions on survey commissioning and research design. Now, that should bring us to about 2.30, possibly earlier, depending on how much we have to say, and then we will still have up to 30 minutes for a discussion with you, the audience. You're invited to put your questions or comments in the chat, which Olga will be monitoring and collating, but there will also be an opportunity to raise your hand during the general discussion, so not during the panel discussion, but later on if you want to actually ask your questions in person.

[00:04:33]

So let's introduce the panel members. First of all, Mike Daly. Mike works in the Central Analysis and Science Strategy Unit in the Department for Work and Pensions. He works on a range of issues, mostly centred around external engagement with academia, like the people here, and also with data linkage and evaluation. We also have with us Michael Dale, who's Head of Longitudinal Studies in the Central Research Division at the Department for Education. We're still waiting to see whether Alastair McAlpine will join us. Ally is the new Chief Statistician in the Scottish Government. His role is wide-ranging, and it includes overseeing the quality and management of its household surveys. Martina Portanti is an Assistant Deputy Director in the Social Survey Delivery Division at the ONS. Martina is responsible for the delivery and development of the Household Finance Survey portfolio at ONS. And then finally, Andrew Spiers. Andrew is the Strategic Lead for Research and Analysis at Sport England. So welcome, and thank you all for joining us. So at this point, I'm going to try and hand over to you so that you can tell us a little bit about the survey research that you are responsible for, so perhaps I could start with you, Mike Daly?

Mike Daly: So a few introductory thoughts about the sort of interested DWP has in surveys. I think the first thing to say isa lot of the survey evidence we get, we don't commission it ourselves directly, so we make a huge amount of use of surveys such as Understanding Society and the Birth Cohort Study, English Longitudinal Study of Ageing and so forth and so on. Some of those we use more than others, some of them we actually co-fund to some extent, so I'm not going to talk about those because although we're desperately interested in the way that those surveys are set up and run, the choices about methods are essentially for the people in charge of those surveys, and it will be completely inappropriate of me to start talking about them. We also have a lot of relatively, well, I think we could call them one-off surveys that we run, so I was talking to colleagues, in fact, just before this about some surveys we're running as part of the evaluations we are doing of various employment programmes, and I can say a bit more in a minute about how we make choices about those surveys. In terms of regular large-scale surveys, we have essentially two that we run, the biggest of those by a distance is the Family Resources Survey, which of course, Martina will know all about, it's not that far removed from your interests. And that's a survey of around 20,000 households, conducted face to face, with fieldwork running throughout the year and that's been running for over 30 years now. And if my colleague, Joanna Littlechild, had been able to be here, she could have said much more about that, but in fact, she is busily preparing for the publication tomorrow of the latest results. So if anybody's interested in the FRS, you need to get on the internet at 9.30 tomorrow morning, and you will see lots of exciting stuff there. The other survey which we run regularly, which is very, very different, is our internal customer satisfaction and experience survey, which is carried out, the fieldwork is quarterly, around 12,000 respondents per year, and that is one where we are moving from face to face data collection, more towards online data collection.

I was about to say something about how we choose our approaches, and it is very much dependent on the context. So when you think about something like the Family Resources Survey,

this is something which provides data which not only is a source for published national statistics, including important things like our estimates of how many people are below the poverty line, but it also forms the base data for the microsimulation model we have for all DWP policies, and a range of other uses. So the onus on us to get this as right as we possibly can and our willingness to invest heavily in getting the right results is huge, as also is the pressure to make sure we don't do anything which upsets the consistency of data collected over time. And one of the things that we have to accept with our methodology for the FRS is that there is a significant time lag in it, so the results published tomorrow relate to the financial year 21/22, so there's quite a time lag in that. Another important consideration in our design of that is we collect an enormous amount of data, so the questionnaire is very long, some of the questions are quite involved. We try to collect data from everybody in a household, so all of those things tend to point us towards face to face data collection, as we've done for many years. The customer experience survey is almost at the other end of the spectrum, where although there is a sort of premium on getting good data out of it, the importance of getting results as quickly as possible and having a survey which is as agile as possible to respond to changing policy and operational needs is huge. And the questions we ask are relatively straightforward and we ask them of individuals rather than households, so that points us in a different direction for the survey methodology. And then all of the other one-off surveys which we do, it's the same sort of criteria we consider – how important is the survey, how quickly do we need the results, how involved is the data collection and what sort of data are we collecting? And we make decisions as we see appropriate in each case. So I think I've gone over my five minutes, I will shut up at that point and I'm sure we'll have interesting questions later.

[00:12:29]

Andrew Spiers: Good afternoon, everyone. So I'm Andrew Spiers, I lead the Research and Analysis team at Sport England, and for those of who are perhaps not familiar with Sport England, we're an arms-length body of the Department for Culture, Media and Sport, and our responsibility, as the name suggests, is to promote community sport and physical activity amongst the population of England. So core to our mission as an organisation is about increasing levels of activity amongst people, reducing levels of inactivity, I guess the flipside of that, and within that, tackling the inequalities that we observed in that work, that that's informed engagement, so it might be about age, gender, socioeconomic status, disability, cultural diversity and other characteristics. For a relatively small arms-length body, I think it's probably fair to say we've made quite a major and longstanding commitment to sort of population-level measurement surveys, so we can go right back to 2005/6, where we launched our Active People survey, which was a landline telephone survey for adults, people aged 16 and over, with the exception of one year's worth of gap in 2006/7, we ran that for 10 annual waves. But then in 2015/16, we launched our current adult participation survey, called the Active Lives survey, which is a mixed mode survey where we encourage people to complete online, so a push-to-web survey. That is, again, an adult survey of people aged 16 years and over and it is now in its eighth annual wave of data collection. In 2017/18, we launched alongside our adult survey, our very imaginatively named Active Lives Child survey, which covers children and young people in school, years 1-11, and that survey is an online survey, where we recruit the young people through a sample of schools, and within each school we then randomly select year groups, and within each year group, we randomly select a mixed ability class to collect the data from. All of our surveys perform broadly the same purpose for the organisation, so it's about measuring the levels, patterns and trends of engagement in sports and activity, and probably two of the sort of foundation or most important criteria that we've had when we've been thinking about how we've designed and set up these surveys is the need to be able to measure at a local authority level across England, so to be able to produce a defensible and robust estimate for every local authority in the country, and also to be able to measure activity levels across a range of different types of sports and activities, some of which will be quite low prevalence, so that would

be everything from walking and cycling, fitness activities, dance, and even what might be regarded as more traditional sports like football, tennis, cricket etc.

So those two requirements, the ability to look at quite a local level and also some measures in quite low prevalence activities has dictated to some extent the sort of scale of the data collection that we do. So with the adult survey, typically we get about 175,000 responses each year, and for the child survey, it's a bit smaller, but we still achieve about 100,000 responses each year. And again, we'll come back to this, I'm sure, over the course of the session, but that requirement has, I guess, dictated some of the choices we've made around the mode of data collection we do. And alongside our specific needs around understanding physical activity and patterns of behaviour, we also collect some data on behalf of some key partners, so the Office for Health Improvement, and disparities, where we collect some additional physical activity data around gardening, which they add to the rest of the physical activity information that we collect. We also ask questions around height and weight on the other half, which enables them to calculate excess weight in the population, and also consumption of fruit and vegetables, so how many people are meeting the five a day target. So some broader public health measures there, which are very relevant to our mission as an organisation as well.

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Then we also do some work with the Department for Transport, who use some of the walking and cycling data that's collected, to provide a local walking and cycling statistics. There are a few other things the survey covers as well, which are of more relevance to sporting, and so those people that volunteer to support sport and physical activity, people's attitudes towards sport and physical activity, the extent to which they enjoy it, how comfortable and capable they feel playing sport, and also some information around what we describe as outcomes, but essentially things that are sort of positive outcomes which we know are associated with physical activity and it's interesting to sort of see the correlations there.

All of the data collection we do I guess starts with a probability sampling approach, and I think that's very important to us. It's all cross-sectional, and at the moment, all of it is self-reported data that comes forward from eh respondents. And I guess in common with most of the other sort of commissioners who will be on this call, that data then is really important to us in terms of guiding our decision making around a range of things, so it helps us understand the populations of most need, the places and geographies that most need our help and support, it helps us understand overall trends in activity and how things are going there, but also how patterns and preferences are changing between activities, which again is really helpful in guiding our sort of policy and investment decisions. So hopefully that gives a reasonable overview of, yeah, Sport England and our sort of background and history in terms of data collection. Gerry, back to you.

Michael Dale: I'm from the DfE, and I'm primarily responsible for longitudinal surveys, but I'll try and talk a bit more generally about the surveys that we commission. So I've got quite a long list: so our longitudinal studies primarily focus on children and young people's outcomes, so we're finishing off LSYV2, which was a sort of a cohort of adolescents passing into the labour markets, we're currently running a big programme called EOPS, which is four or five year studies looking at the progress and development of children and young people across various different stages through education, from early years through to post-16. And we've also got another longitudinal study of care leavers, so each of those are big probability sample longitudinal studies that collect a lot of data that really enhances the registered records that we've got in relation to service use and that sort of thing. And yeah, they're all very much focused on children and young people, their outcomes and sort of feeding into strategy level evidence bases and decisions and that sort of thing. So that's children and young people, if you like, in the longitudinal part. The other part of

the longitudinal work that we do is in relation to practitioners, where we want to understand their experience of their job and retention and quality and all those sorts of things. We have one on teachers, which is ongoing, and we also have one on the cohort of social workers, which is just wrapping up, it's been extremely valuable and perhaps we're looking to do something similar with that, we'll extend that cohort somehow. So those are the longitudinal studies, then we've got more sort of topical omnibus studies, where we're looking for kind of quick perception attitudinal data to help inform rapidly evolving policy thinking. So we've got one of young people, one of pupils and parents, as well as school teachers and leavers, and I think there's one in the post-16 space as well, but as the omnibus name suggests, that's quite sort of an eclectic bunch of questions that I think they're done quarterly, those surveys, a very quick turnaround information, that perhaps isn't quite so robust, but nonetheless, it's better than having no evidence whatsoever. And then we've got very policy-specific projects like the Childcare surveys, and there's one on Skills and Qualifications, and you know, we'll also have surveys that are service evaluations etc., and these are kind of studies that are narrow in their scope, but have a great deal of depth in relation to a specific population of interest, specific policy, or it might be that they regularly collect trends that are most pertinent to a very particular policy. So that isn't a complete list, but it's an example of some of the types of policy-relevant surveys we commission.

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Then we've got involvement in international studies, so there's for example PISA, which we use for benchmarking, the ministers do like a good international comparison, it gets a lot of press, and we're also involved as co-funders in the Learning Cohort Study, and in some sort of advisory capacity in relation to a lot of the ESRC-funded longitudinal studies, which are often run by UCL. And then on the question of why do we collect all this data, what's the point, why are we spending millions and millions of pounds on all this stuff, essentially it's to help improve policy or come up with new policies, or ask the Treasury for sustained money or more money, those are very crude terms obviously, but I think a lot of what we do, that's what it boils down to. I could be a little bit more specific if you allow me the time. So in terms of….I can use LSYP2 as a case study, but in terms of targeting policy, that's recently helped us profile pupils with different levels of and reasons for unauthorised absence, which has been a big issue, particularly after the pandemic, in terms of understanding outcomes. So we've been able to brief Number 10 recently on how those taking apprenticeship post-16 groups seem to fare well, both in terms of material and wellbeing outcomes. Raising awareness of issues is another function, so we've been able to enable a minister to write to the sector to encourage them to work against the gendered issues in STEM, so showing that girls are…in science and maths, when everyone's taking the same exams, they do just as well, if not better than boys, but after that, they're less interested, less likely to take a STEM job and go down that path. So yeah, the minister wrote something in the national press and wrote directly to providers as well, encouraging them to tackle that prejudice and how to do it.

There's lots of things around government, like, government reviews and inquiries and that sort of thing, LSYP2 has been used a lot for that sort of thing, so models, yeah, so we had models of how ethnicity is predictive of Key Stage Four, for example, and that fed into a Commission on Race and Ethnic Disparities, which I think was run by the Cabinet Office. There's other things like emerging issues, where it's just handy to have a really rich dataset on something that's suddenly become topical, and you know, there's lots of studies that fed into this, but when the pandemic struck, we were able to look in a longitudinal sense at how it was impacting the psychological health of a particular cohort of young people, and the differential impact within that as well, who was suffering the worst. And then also, just the big sort of strategic questions that sometimes require very rich data to understand, so for example, here is a better understanding…understanding why disadvantaged pupils in London do better compared with

their peers, so yeah, with a multilevel model, bringing in the admin data and all the survey data we have, we were able to pretty much explain that, which was helpful, albeit not necessarily the answer the ministers wanted, because they wanted to hear there was a policy, a strong policy driver behind London's advantage, if you like, it didn't turn out to be the case. So yeah, that's me, thanks for giving me some time, and happy to take questions later on.

Olga: Sorry, there was one question on the chat, specifically to Michael, about the care leaver's study.

Claire Warman: Yeah, sorry, it was me that asked the question, I just wondered if it was LEO you were talking about, or something different? I'm the Care Leavers Analyst Lead for DWP, and I wasn't aware of anything other than LEO.

Michael: No, so this is the dedicated longitudinal study following a particular group of care leavers. I think it might have been those that were on a kinship order arrangement, I'm not sure of the exact terminology, it's not my remit. But if you, yeah, if you drop me an email, I can connect you with the project leader.

[00:25:44]

Martina Portanti: Hi, my name is Martina Portanti, and as Gerry mentioned, I had the area at ONS that looks after all our Household Finances statistics and surveys. So basically, when I talk about household finances surveys, I'm talking about our Living Costs and Food survey, our Wealth Analysis survey, and the Survey on Living Conditions. So obviously, as people on the call will know, ONS does carry out a lot of surveys, quite large labour force survey, current survey, during the pandemic, we are still running actually the Covid Infections survey. So there are probably more surveys than I can really mention in this five minutes call, which is why I'm going to concentrate very much on the three that I look after in my area. So I think I'm a bit in a fortunate position in my role, that we sort of sit a little bit in between what is a more traditional commissioning role and a data collection role. So clearly ONS doesn't have the sort of policy aspect, also we don't contribute directly to policy, we collect a lot of data and that is used by a lot of government departments to inform their policies, and we also collect a lot of data ourselves, so we can commission, design and carry out the collection in the same place, which creates some interesting tensions sometimes between the different hats that one is wearing. But essentially, the three surveys that I look after, they are quite large, very expensive, complicated surveys, but I will summarise them. So a little bit similar to what Mike explained in terms of the Family Resource Survey, they're all surveys that collect sort of financial information from householders. So the Living Cost and Food Survey is around 5000 households per year, and collects a lot of very detailed expenditure information on what the UK households buy, mostly face to face, it has also got a diary, where we ask people for two weeks to record everything they spend their money on, so that is quite burdensome for not only the respondents, but also for us to pick up and process in house. We then have the Survey of Living Conditions, which is something that ONS has been carrying out to feed into Eurostats statistics, and we're still carrying out now, even after Brexit, and this is a longitudinal survey of households, when we collect a lot of detailed information about income and poverty. And the longitudinal element basically allows us to assess whether people are staying in poverty, so it fits into statistics of a persistent poverty, which is something that is very unique to the SFC actually, giving its longitudinal nature. And the third survey is the Wealth and Asset Survey, and this is, again, quite a unique survey actually, also internationally, because we collect quite a lot of detailed information on what people own, their assets, so their pension, in order to produce a figure of basically wealth for Great Britain, so this one is not carried out in Northern Ireland. The Wealth and Asset Survey is also a longitudinal survey, I think we are getting…we are currently collecting its eighth round of data, so it's been running for around 16 years. Some of the other surveys, I'm not sure on their history, I mean, ONS has been collecting expenditure data since

1957 in some sort of form or another. So I think I resonate a lot with what Mike mentioned before about the need of consistency over time, which sometimes creates issues when we try to modernise data collection.

The other two things specifically that I find with these surveys is, as I mentioned, it's the complexity of the topic, so at the moment, we are looking at options to redesign these surveys, we are carrying out a large project to redesign the surveys. It's called the finances of statistics transformation. Some of the people on the call might have seen our recent consultation that closed. But essentially, from a survey point of view, the biggest challenge we have is that our users want very rich information, a lot of variables from the same households, and that is very challenging to move away from a more traditional interviewer-led role, because it just doesn't fit in 20 minutes online interview. The other aspect as well that is quite challenging is having to do the longitudinal aspect, so it's good to know that the other Michael here is also aware of some of these challenges with longitudinal data, it's just very difficult, it's all the engagement in between waves and making sure that people come back and they don't get bored. And I think it's fair to say that some of the topics clearly on household finances are not exactly the most exciting. So there are all these sort of challenges. So we're looking at options to try to modernise, and I think there is a lot of pressure to try to make these surveys less expensive, which is probably something that most commissioners feel a little bit the pinch at the moment, in the current financial climate. I haven't really kept time, a record of time, Gerry, if I have hit my five minutes or not.

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Ally McAlpine: So I'll just give you a bit of the context of the Scottish surveys that we've got running. So there's three large household surveys that we run in the Scottish Government, so we have the Scottish Health Survey, the Scottish Household Survey, which also includes the Scottish House Conditions Survey, and then the Scottish Crime and Justice Survey, and those are essential sources of data and they provide detailed information on all the kind of topics of housing, fuel poverty, energy efficiency, transport, culture, volunteering, childcare, lots, crime and justice as well. Quite importantly as well is also the equality characteristics, so I'll come back to that in a second. But I mean, data from each of these surveys is feeding into national statistics publications, and our national performance indicators as well, through the national performance framework, which is our wellbeing measures in Scotland. Prior to Covid19, we were doing all these household surveys face to face, and interviews with around 20,000 households every year, usually involving visiting between 4000-6000 households in a four-six week period. That's obviously changed a little bit, but it was important actually that those three surveys, we combined them together, because we've also got the Scottish Surveys Core Questions in there, which allows us – and those are the common questions that we ask across all three of the surveys, which gives us a bit more breadth and allows us to give a bit more detailed analysis at a local authority level, and for small population groups, which is why it's important to identify equality characteristics out of the core questions as well.

I'll just briefly run, I know you're probably trying to catch up with time, Gerry, so I'll not go into too much detail, but I'll just highlight a few other big surveys that we've got. So we've got Growing Up In Scotland, which is a longitudinal study, and it is a fantastic piece of work, run since 2005/6. The children were about 10 months old at that stage, so GUiS has followed them and it's the best quality available data source that we really have on children and young people of that age group, and it's used quite extensively, not just at a national and local level, but also at a voluntary sector level as well, and policymakers are able to use that, it's available for academics, practitioners, researchers. But the longitudinal nature of that study really allows us to do some in-depth analysis of the impact of early life experiences, and since we've gone through the first, second and now onto the third cohorts, later outcomes as well, and that current first cohort are now on the cusp of

adulthood, and that's quite important. I was also in a discussion yesterday with an aptly named HAGIS, which is Healthy AGeing in Scotland, and that's a piece of work that's been done by David Bell at Stirling University, and we're looking at that as well because I think we're also now starting to track those parents who are now starting to move into older age. So I think with all of these surveys together, it's given us a real span of lived experience in Scotland, outcomes and how that affects those outcomes.

I'll mention a couple of other ones as well, I'll mention one more, Gerry, and then I'll hand back to you. I'll mention this one because it's close to my heart because it used to be the area before I became Chief Statistician, I worked in agriculture, but we have the Scottish Farm Business Survey as well, and that's really, it is an authoritative financial analysis of farming in Scotland and farm businesses in Scotland, and it's really important to be able to estimate Scottish farm business income, which everybody assumes farmers are wealthy and rich, which couldn't be further from the truth, and it really does help us to start to look at – how do we replace common agricultural policy, what support needs to be done to help support farmers become more environmentally friendly, not that they already aren't , they are, but how can we help support them, can they support objectives to capture carbon on farms, as well as reduce their carbon outputs. I'll stop at that point, I could go on, but Gerry, I think you want to move on now to further questions.

[00:36:15]

Gerry: Thank you, yeah, I'm sure we'll have lots more questions for you as we go along, so that's fine, but thank you all very much for that overview. I mean, one of the things that seems to be popping up again and again in what you were all saying, and it's something that we're going to try and unpick in the next, what is it, hour, 45 minutes, is on the one hand this need for very rich, very precise, accurate data on very complex issues, the need for consistent time series, which seems to be pushing people towards the face to face big surveys, versus also the need for more timely surveys that can react to emerging issues, and obviously those, how the data are being used, what the reason is is affecting how you then decide on the survey design. So those are the things we will be looking at in a little bit more detail in a bit. But first I thought we would just step back a bit and just think, okay, we've seen, especially during the pandemic, that the survey method has been great, you know, there's still a lot of information that was needed at the time, and it could be quite timely and agile, possibly at the expense of some level of accuracy, but that's something we can discuss. But I just wanted to get your views really about what the strengths and the weaknesses of the survey method are for meeting your needs, because of course, it can do quite a bit, as you've already explained, but are there also limitations to what it can do? So maybe I'll start this time with Michael.

Michael Dale: It's a big question. So just some top of the head reflections. Our Cohort studies that we've been setting up recently, looking at the longitudinal progress of children and young people over the five course period, be it through early years, primary school, secondary school, post-16, we, despite sort of all the troubles in the pandemic, and industry-related problems, we decided to stick with wave one being face to face. There's a couple of reasons that we decided to do that, firstly we wanted to build up a rapport with participants, because we're going to be speaking to them again and again, and having someone in your living room, having a cup of tea with a laptop, is a good way of getting engagement with participants. The other thing is wave one, that's when you're going to have the most people in your study, because you get attrition thereafter, so having that as a substantive data gathering exercise is important. And also there are just some types of data that you can only collect when there's a level of supervision or, you know, presence in terms of the fieldworker, so a number of our studies, we're doing direct assessments of the child or parent that, yeah, can't just be administered by remote modes. So yeah, there's kind of a bunch of things acting cumulatively to suggest that face to face is important in that context of wave one. There's

going to be in subsequent waves for each of the studies, there will be online modes in operation, and they will absolutely fit the bill but we will be going back to face to face modes later for the exact same reason as those that I mentioned before. So yeah, in that context, and in the EOPS context at least, face to face still is indispensable and worth the considerable cost. Is that a helpful thing to have said, does that kick us off?

Gerry: Yeah, that's fine, I'm just also wondering whether there are any particular data requirements that you find currently that are particularly challenging to meet if you're using a survey? So irrespective of what mode, but just the survey method itself, what can it deliver but what does it fail to deliver, is there anything it fails to deliver?

Michael Dale: I think just going back to the direct assessment point, that is a super useful way of getting, of generating evidence, inasmuch as you use a validated objective instrument to get a good read, scientific read, if you like, on, for example, a child's cognitive development, as opposed to just relying on their attainment records from school, which aren't necessarily a good reflection of that child's cognitive ability, there's all sorts of factors influencing whether or not children do well at school. The survey method is predicated on sample, well, you all know that, and that's where it starts to fall down sometimes, because the administrative datasets that are available in a lot of departments are pretty much a census, and you can do detailed subgroup and intersectionality analysis that just isn't available in survey datasets because you know, the surveys aren't sufficiently powered to be broken into lots of kind of…to the point where you can have high levels of specificity, or at least the confidence intervals become unhelpful. So in that sense, the surveys will always be competing against economists and statisticians in the departments who are looking at these giant datasets from administrative records, which are often linked and can be studied in the longitudinal sense as well. I suppose the other thing to say as well about…I don't know, it would be interesting to hear colleagues' thoughts, but surveys are typically thought of as a way of getting perceptions and attitudes and opinions and intentions, all of which broadly fall under the sort of the soft evidence rubric if you like, people's intension are, well, aren't always followed through, and people's attitudes and opinions in a survey context aren't necessarily how they operate in real life etc. So I think that's, you know, there's some potential limitations there to that.

[00:42:35]

Gerry: Great, okay, thank you. I think I might hand over maybe to either Mike or maybe Martina, because of course, your surveys collect a lot of factual information as well, so why aren't you using your administrative records and all the other data, why do you need surveys?

Mike Daly: Shall I have a go at that first? So certainly there are limitations of surveys, so maybe I can go in the other direction and talk about limitations of administrative data. So it's certainly true, and it's one of the reasons why we are continuing to develop the potential for linking administrative data to the survey data in the Family Resources Survey. One of the difficulties is that the administrative data can tell us a huge amount about exactly which benefits people are receiving and how much they're getting, can produce that on a very frequent basis, but they tell us virtually nothing about the people who are receiving the benefits. So if we want to know even something fairly basic actually with our administrative data, like the breakdown between people from different ethnic groups, for example, or people's family circumstances, which socioeconomic group they come from, none of that's in the administrative data. So if you're using a single source, then there is a choice sometimes between whether you want a dataset which is very large, very accurate, it's got a huge sample size, but is actually very thin when looking at an individual, or something which is increasingly rich on an individual basis, but has tiny samples, comparatively tiny sample size. So we are doing more work to combine sources, but it's, for various reasons, that can be somewhat slow going.

The other thing that is worth bringing out, and I think this is something Sir Ian Diamond has pointed out a few time when I've heard him talk, is that sometimes surveys are actually rather more nimble than administrative data, and you think particularly at the speed with which ONS set up the Covid Infection Survey, and all the other survey work was done, so for instance, the Covid Supplementary Surveys were introduced by Understanding Society and the Birth Cohort studies – much, much more quickly than you can adapt administrative records to produce similar information. So I think the assumption that administrative data is more timely is sometimes a bit of a sloppy one, you need to look at the limitations. I think you also need to bear in mind that there are errors in administrative data as well, and both in there's measurement error, administrative systems are not perfect, and there are coverage errors, that not everybody's included in administrative data, and sometimes I think that the kind of errors that we get in surveys are better understood, we're used to dealing with them and taking them into account in analysis, whereas with the administrative data, there is…I think particularly if you're quite mindful about people loving to get their hands on those huge datasets, there is sometimes just an assumption that it's all perfect and you don't have to worry about where it comes from, and that just ain't true.

Gerry: Okay, great, thank you. I'm just going to check, before I move on, can I just check if anyone else wants to add anything to that about the strengths and the limitations? Sorry, Ally?

Ally McAlpine: I think the one thing I would say is I agree with what Mike and Michael have said, actually, and I don't think it's either/or. I think there are advantages to both administrative data and surveys, and there's obviously differences in the way we can do it. I think there's a real value in face to face interviewing, and I've recently been out with a field force officer, and actually seen how that and why that adds value, and you just have to sit in one of these interviews, and you get it. I think there's a lot of value from administrative data. For me, the crux of it is we can bring both things together and bring all that rich data, then we can bring every bit of value out of it, and as somebody who is, you know, commissioning surveys, what I'm looking for is how much value can I get out of that amount of money that we've spent either on administrative data or on survey data, so by bringing those things together, we get every ounce of value from all of the data that we've collected.

[00:48:51]

Gerry: Okay, great, thank you. I'm going to…sorry, Martina.

Martina Portanti: There was just one point I wanted to add to that, I mean, I think something else we need to also be careful with admin data is there may be some barriers in terms of being able to share it, particularly at the microdata level. Some of the data-sharing agreements we've got in place actually they don't really allow us to make that data available to the wider community, so I think it's something else that we just need to be a little bit careful. There is a lot of value, I think there is a lot of value in admin data, particularly for those smaller estimates, which is where we really struggle with the surveys. But there are also some drawbacks.

Gerry: Great, yeah, okay, thank you. I'm going to move on now to think about modes of data collection. We've already started thinking about that and talking about that, but yeah, for many decades, face to face data collection has been the primary data collection mode for most high quality surveys, and I say 'most', because of course, the Active People Survey, which was the precursor of the Active Lives Survey, was a telephone survey. And I would like to explore that reason with Andrew in a minute, but first, I'd like to ask why has face to face data collection been the mode of choice for most high quality surveys in the UK, and of course, a lot of you have already mentioned

the bit about the richness of the data, and being able to understand what the data is about. So yeah, why have we stuck to the face to face for so long? Maybe I could ask Ally first?

Ally McAlpine: I think there isa temptation to say well, it's because it's the way that we've always done things, and a lot of the things I'm trying to change within the Scottish Government is the way statistics is done, it's to look at reviewing those things. I'll come back to that point where I walked round Edinburgh with an interviewer and just seeing the value that that person was getting, it's the understanding of what they're trying to achieve and how they can tease that information out, when it's not…the person who's being interviewed doesn't maybe understand the question if you present that in an online form, if you asked that over the telephone, you're not getting those nuances of, you know, the kind of suggestive facial expressions or things like that, and I think those are the parts that face to face interviews, that absolutely trump everything. But I think we've had a big experiment, haven't we, we've had Covid19, we've had to move away from face to face and look at telephone interviews, and if I look at telephone surveys, we know they were getting lower response rates, we know that it's more difficult to achieve satisfactory sample sizes, we know that it's increasing the bias in the data, and we know that it means that we're getting less accurate and less representative analysis and an unclear picture of Scotland's population as a whole. What I don't think is that we can carry on doing just as we have done in the past and just use face to face, I think there has to be maybe a multimode system, where we think about it, but I mentioned earlier on, and I'll just leave on this point, I mentioned earlier on the Crime and Justice Survey, and that can be touching on really sensitive issues like sexual victimisation, partner abuse, those are thorny issues, you can't do that justice without putting somebody in there to ask those questions sensitively.

Gerry: Okay, thank you, I'm going to bring Andrew in at this point though, because of course, when face to face was the primary data collection mode, you didn't choose face to face for the Active People Survey, I know a little bit about the background for that, but I'd like you to share that with the rest of us, given what Ally has just been saying about some of the problems with telephone, you decided back then to opt for the telephone method, rather than face to face interviewing. Can you explain something about the trade off that you were making, or the decision making?

[00:52:11]

Andrew Spiers: Yeah, and I think you're right, Gerry, to describe it as a trade-off. I think, and fundamentally, we had this central requirement where we were required to provide local authority level estimates, and we had a finite budget that we could justify spending on eh study that we had. And we looked at the various sort of modes of data collection that were available then and equally, when we revisited this, when we made the change from the Active People to the Active Lives Survey, face to face interviewing was prohibitively expensive for us to do that. Sort of broadly speaking, it was sort of between five and sort of 10 times the cost per respondent to do a survey like that, and there's no way we could sustain that kind of investment. So that's been at the heart of, I guess, our more pragmatic approach to it as well, whilst I think we probably accept at times the response rates one can achieve through face to face data collection, less so now, but the sampling frames that people were able to use for face to face data collection versus the telephone design back in the sort of mid-00s, yeah, there were compromises behind made there, but there was no way that we could get the scale of data that we wanted to produce, the granularity geographically of estimates that we wanted to if we went down that approach. So we went for the best data collection method we could afford, and we were quite strong in other aspects of the survey design, so again, having a strong sampling frame and a good probability sampling approach was an absolute central requirement to us, and again, quite expensive, even when you apply it to those cheaper modes of data collection, but it was, yeah, we were pragmatic in the choices we made

to be able to deliver the objectives of the study as we saw them within the constraints of the budgets we had.

Gerry:　　　　　Great, thank you very much. So before the pandemic, we were already witnessing a gradual shift from interviewing assisted modes, either face to face or telephone, to online. I mean, the Community Lives Survey was the first high profile survey to use a push to web approach, rather than a face to face, and then of course, t eh switch from telephone to push to web for the Active Lives survey and also the considerable development work being carried out at ONS for a web-first approach for the future Labour Markets Survey. But on the whole, there was still some hesitancy to move towards online data collection for most high profile government-funded surveys, and so thinking back, well, I think we'll miss that one, we'll move on. During lockdown, when most face to face data collection was suspended, we saw survey commissioners responding in different ways. Andrew, you were lucky, you had your online postal method, so you just carried on, but data collection was paused for the Health Survey for England, for example, web/telephone follow ups were carried out among previous responders to the National Survey for Wales and the Crime Survey. Push to web was used for fresh address samples, but possibly less than what we would have expected, whereas push to telephone was being used on quite a few government-funded surveys, such as the Family Resources Survey, National Travel Survey, and the English Housing Survey. So again, even when face to face was suspended, for some of these high quality, high profile government-funded surveys, they didn't move online, instead they opted for the telephone. Why? So Mike, I think, you know, because you were heavily involved in the FRS, maybe you could explain, why opt for the push to telephone rather than push to online?

Mike Daly:　　　I'm not absolutely sure of all the considerations there. One thing I was going to say is that your question about why we stuck with face to face, the experience of having to do it by telephone has to some extent confirmed for us that, yes, we were absolutely right to stick with face to face, so there'll be more in the publications tomorrow, but the FRS was significantly impacted by having to do things by phone. I think probably it's something where there's perhaps more expertise to translate an interview quickly, but I Think if you've got an existing face to face survey and an interview design, then you can fairly straightforwardly say, "Well, we'll just phone somebody up and ask the same questions on the phone instead of standing in front of them or sitting in their living room." Turning something into an online survey takes a fairly substantial amount of development. I was just going to say a couple of things about the face to face versus other modes and why we stuck to them, and one is the longstanding result that you g et better response rates face to face, and you know, response rates are not the be all and end all, nevertheless, they are an important consideration, not just for survey quality, but for the survey credibility. So that's always been an issue. There's been an issue of sampling frames, so we have, for many years, used the postcode address file as a starting point for our face to face surveys, there isn't really equivalent for telephones, so random digit dialling does, in principle, give you some of the same strengths, but has a lot of problems as well. If you look at the history of surveys, the experience they've had many years ago in the US of what happens when you run a telephone survey by looking at the telephone book and just assuming that people with a telephone in 1940 were a random subset of the population, you can go very wrong. So the sampling frame is really important. And also interview length, that I think it was always the received wisdom that there was an indefinite cut off to how long you could make an interview on the telephone, and I Think that's probably expanded a bit in later years, but nevertheless, I don't think anybody would contemplate running a survey over the telephone that was going to take two or three hours to complete. So those are all the reasons why we've tended to stick to face to face.

[00:59:25]

Gerry: And likely to continue with face to face, or has the pandemic changed any thinking around the mode moving forward, or has anything…I think you've already said it earlier on, it's confirmed that face to face is probably the best method for the FSR?

Michael Daly: I think in the FRS, it's essentially confirmed that, yes, we were right and where there are other surveys where people have said, "Do you know what, actually, it's worked quite well on the phone or online, we'll stick with that." So yeah, I think the experience varies from one survey to another, but I think that's the whole point of the new survey data collection collaboration, is to try and bring together that evidence that's been gathered over the last few years, and seeing what we can learn from it collectively.

Gerry: Okay, great, thank you, if I could just check with the other panel members, has anyone's position on the use of online changed, or telephone changed because of what happened during the pandemic? Has anyone's opinion changed about maybe the need to move away from face to face at all?

Ally McAlpine: I think what I would say from the Scottish perspective, what I would say is that, you know, face to face has got an extraordinary cost, especially in extra-rural areas, I mean, if I go round England and look at the rural areas in England, they feel like urban areas in Scotland, and you know, we have more sheep than we have people in certain parts. So you need to still do the face to face, and I think telephone, I think we need to think about what is the extra cost of doing face to face over telephone. And I think the other thing that's coming out of what we're doing in Scotland, the Scottish Government announced a resource spending review as well, which is creating a lot of us to think about carefully how efficiently we deliver services, how efficiently we gather data, and things like that. So I think there's a natural progression we're going to have to think about mixed modes or thinking about how we do it. So when I say that mixed modes, to go back to what I said earlier, as well is that you can't get away from that value that you get from face to face, but we just need to think about it in the mix.

Gerry: Okay.

Michael Dale: I've got a few things to say as well, Gerry, if that's okay?

Gerry: Yeah, sure.

Michael Dale: So I think baked into the question, there's an assumption that face to face is default in some way, I don't think it is, you know, it's all project-specific stuff, and yeah, there's the cost element. Even if face to face is good value, we are still operating with fixed funding envelopes, right, so if you…it's a zero sum game, if you spend a lot on face to face in one project, then another project's going to be sort of constrained to correspond with that. But yeah, we don't just…commissioners, I believe, don't naturally gravitate towards face to face unless there's a very strong case for it, and I don't know if you're sort of aware of what happens within departments when commissioning research and surveys, but essentially we have to be very clear about what an evidence requirement is in relation to a particular policy requirement, and go through various iterations of scoping, and you know, a tender document that eventually comes to the market, and we say, "This is what we think we need in terms of sample sizes and mode etc." And you know, there will have been either a lot of qualified people feeding into that decision, which mode is most cost effective, or will be advised to ask the market which mode is best suited to what we're trying to achieve. So I think when we do choose face to face, it's not something that's done lightly, and there's normally good reasons for it, and you know, would we be even having this debate if we

didn't have the pandemic and the problems with field forces, recruitment etc. I think we probably might just because the world's moved on with the technology, it was sort of accelerated by the pandemic, but people just now are very much used to, you know, talking to faces in boxes on screens, and indeed, that may be the preference of some people as well, so people may now prefer to have remote modes rather than have people in their living rooms, and that sort of thing. So I think that will play out as well, but yeah, there are just some types of data collection for some types of studies that require face to face, and I think that's always going to be the case to a degree. Just one final last point, I'm aware I'm hogging the mic, there's just something about conventional data collection that means that it's well sort of aligned to the social science, sort of the social science-type work, the more robust work. Some things can be, you know, "We need a certain standard of evidence," and that's fine, and other things where policy, there's millions, well, billions of pounds worth of policy decision might be based on it, you need the highest standard of evidence, and so, you know, people will be prepared to pay for the best types of data collection.

[01:04:59]

Gerry: Okay, great, thank you. Andrew, you've got your hand up.

Andrew Spiers: Thank you, I just wanted to build on the point that Michael was just making. I think choice about mode should be based on, as others have said, you know, the context and the requirements of a particular study. And I also think the pandemic probably has accelerated a few things that we were observing before. But it just feels to me like some of the more traditional modes of data collection have been increasingly finding it challenging to retain the response rates that they perhaps historically have, and that's been a challenge for them. And I think one of my observations of having worked with a push to web survey now for quite a few years is it still feels like it's a methodology that we are improving and refining year on year as we learn how to do it better, and the natural kind of default of the population is they are increasingly connected and digital and more comfortable giving information through these methods, so I don't think it's necessarily the right answer in all instances, but it feels like a methodology that's sort of on the up, as it were, rather than one that perhaps is being threatened by perhaps changing patterns of behaviour, lifestyles, use of technology in households, so, yeah, just an observation.

Gerry: Great, thank you. I am going to, because we are running a bit out of time, so I am going to push forward a little bit, because of course, in addition to shifts in mode, we've also seen an increasing interest in the use of new technologies, or maybe not so new, but new for survey research at least, such as mobile device data and meters that can be placed with respondents. We're seeing a lot of the work in this area being carried out for academic surveys, including the work carried out at the Centre for Longitudinal Studies and ISA. But the use of new technologies in government-funded surveys is still quite limited, and given that, you know, the use of new technologies in potentially reducing responder burden and potentially improving accuracy, what do you think are the barriers to using new technologies in your surveys and how can survey suppliers help you? Who wants to go first?

Martina Portanti: Maybe if I can jump in, we're looking at some of these issues in our Living Costs and Food Survey. So initially we got this diary, it's always been on paper, with the pandemic, we had to quickly make it in a slightly different mode, so at the moment, we are getting people to basically take pictures of receipts and send them to us. And basically, there has been a project carried out for a number of years in collaboration with other European countries, and particularly Statistics Netherlands, to look at the development of app, an app essentially to try to track expenditure. I think something in terms of government surveys, there was a bit of a barrier of, or you know, can be seen as a barrier or is it useful framework to work in, clearly there are some guidelines in terms of government digital services that we need to adhere to, and accessibility and that does create

some additional work maybe as compared to being a private sort of provider, and you can just go on and try some new technology. I think there is a lot of potential, so on expenditure in particular, clearly people do a lot of purchases online, you know, I myself only use my Google Pay to pay anything at the tap of a phone, so there is really a lot of potential there to explore how you go about linking the sort of information back into the survey. I don't think that new technology can completely substitute the survey, because as others have mentioned, there is also the limitation of admin data, you still don't get the rich such demographic that really is what people want out of our survey data. But there is definitely a lot that we could explore and it could really help to improve respondent burden as well. Plus there is some evidence, as you know, Gerry, that the younger generation might be keener to co-operate into these surveys, which is always a demographic we struggle a little bit to capture.

[01:09:28]

Gerry: Okay, great, thank you. Any other thoughts on that, and also maybe thoughts on what survey providers could be doing, or academic researchers, to help you make use of these technologies?

Mike Daly: Just a few slightly random thoughts on this, Gerry, and one is that clearly you have to have a need for data which can be collected through new technologies, and there are some things which it's appropriate for, I mean, Martina was talking about detailed expenditure data; others that have been used quite often are around activity monitoring. I think the sort of pitfalls that you need to understand, firstly the accessibility issues, you know, who is actually able and willing to use various devices to collect data. Sometimes there are issues around selection bias, so there have been surveys I've seen done in the past which are essentially limited only to people who happen to possess an iPhone, which gives you lots of nice, interesting data and a huge big dataset you can do exciting things with, but is by no means robust survey data. And you also need to think of the accuracy of the data, I mean, there's potentially an apocryphal story about people trying to collect activity data by issuing monitors to people and some people fastening their Fitbit to the dog's collar to make sure they recorded more than the usual number of steps. And it goes back almost to Carry On films and people stirring the thermometer in the cup of tea, to give a false reading. So as with admin data, the assumption that, "Oh, this is a tip-top hi-tech device, so the data must be completely accurate," might not bear close examination in all cases.

Gerry: To give a warning to you, Andrew, if you've already used accelerometers on the Active Lives Survey…you may have to do cross-tabs against people who've got dogs in the house! Michael, you've got your hand up.

Michael Dale: Yeah, so I think two quick points. I think the first one's the most important, and I really do think this is an issue: we're talking kind of about potentially future innovations in technology out there, there's been massive innovation over recent years, I mean, we're all sat talking at screens, looking at each other, having, you know, a virtual meet up, and there's a world in the future where face to face doesn't happen, and this happens instead, and I naively assumed that that was all going to unfold quite quickly after the pandemic, and it didn't . So video interviews didn't fill the gap, if you like, and you know, for very good reasons, it turns out, well, some very good reasons, some not so good reasons, and I just think, you know, whoever gets there first amongst you agencies, and starts to make that happen and work at scale with good data quality, reduced cost etc., or comparatively reduced cost, then I think that's going to be a really big advantage. Yes, some of the reasons were we can only video interview people if they've got Teams, so talking about teenagers with MS Teams on their phone…because it was GDPR compliant or something like that. Yeah, I think another one was we can't , you know, we can't provide…something to do with wiping down phones or something like that during the pandemic, or something like that. But yes, it seems to me that could be sorted out perhaps among…we'll see how it unfolds. And the other

one is apps, so we ran sort of an experiment in children in 2020 EOPS, the early years cohort study, where we asked participants to do face to face data collection, but also download an app and take part in activities, like logging their children's milestones and observations about their children, how parents were feeling, that sort of thing, and I was prepared to write it up as an experiment that hadn't worked and the Department shouldn't do that sort of thing in that context. It was quite successful, so we've got a consistently representative subset of our early years cohort who are actively using the app, and we're getting a lot of very rich data in much more sort of frequent instalments than the typical sort of annual periods. And yeah, so apps can work, and that might be of interest to colleagues.

[01:14:28]

Gerry:　　　　　Great, thank you. Andrew?

Andrew Spiers: Just wanted to pick up again on the video interview point, I mean, just because, yeah, we have the technology to do something doesn't mean people will do it, I think is probably the lesson there. And there's a parallel perhaps to something that we've initially tried with the Active Lives Survey and have gone back to and has actually been more successful the second time we did it, which was QR codes for people to access the landing page for our online survey. It really didn't work very well in 2015/16, when we first tried it. The uptake and much more expansive use of QR codes through the pandemic, we gave it another go as we came out of the pandemic and back into sort of normality and it's worked much better, and I think it is now having a positive impact on the response rates we're achieving through the study, so I think there are some things we just need to keep an eye on and actually understand, not just when the technology is ready, but when the people are ready to use the technology as well, I think that's an important consideration. And then, yeah, the accelerometer example of strapping it to the dog is an interesting one. I think we probably also need to be kind of cognisant that there will be a few people that tell a few porky pies on any questionnaire we will ever send them as well, so the idea that, you know, you can have complete faith in all the data from any mode of collection is probably, you know, we have to be strict about validating data. There are some other things that we're grappling with around accelerometers as well and how we might use them. They can tell us something really quite objective around the intensity of people's activity and the duration of it, perhaps in a way that people can't self-report, but it leaves gaps in other areas in our sort of understanding, so we don't know necessarily what the person is doing, other than they're expending a certain amount of energy. We perhaps know less about how they feel about that activity, which are incredibly important bits of information if we're going to make sensible policy responses to some of these things. So I think for us, accelerometers and technology have a place, but we need to figure out where it is, and I don't think it's necessarily at this stage to wholesale replace our self-reporting data, it's how it sits alongside it and complements and strengthens it.

Gerry:　　　　　Great, okay, thank you. Ally, you've got your hand up too?

Ally McAlpine: I just wanted to come back on your question, Gerry, about what can survey suppliers do to help with new technologies, and I think…I don't think, quite often, people will say, "Oh, governments are risk averse," I don't think we are risk averse at all, there are just a number of hoops that we have to go through before we can go and spend money, and so when we're spending money on surveys, we need to justify why we think this is the best way of doing things. So I think the job the survey suppliers can do to help is if you're suggesting, suggest a way, different ways of doing things, but what…and the guys, certainly the guys in the Scottish Government, I know how busy they are and they don't have time to do this, maybe you don't have the time to do it, but if you're wanting to embrace new technologies, bring with us the evidence of why that will be to deliver either a better outcome or a more efficient outcome or something that will deliver another benefit

that we maybe haven't thought about. So that's the thing, I think, is not just bringing together the new technology, but why that will work as well, and that will help whoever it is that's trying to procure the survey to think about the case that they're building when they have to go and get the 10th sign off that month to get that through.

Gerry: Great, thank you. I've got quite a few survey providers listening at the moment, so hopefully they're hearing you. Okay, great. In the interests of times, I'm going to move on a little bit more quickly now. We're starting to notice an increasing interest in reducing the carbon footprint of surveys, for example, the Welsh Government specified that this should be a key requirement for the recent redesign of the National Survey for Wales, and Andrew, you wanted us to cover this at this meeting as well, so it's obviously something that Sport England is interested in. So perhaps, Andrew, if you could tell us how important is carbon reduction when you're thinking about the design of your surveys? For example, you could drop your paper questionnaires on the Active Lives Survey, but that would increase the bias. To what extent is that an acceptable trade off? How do you make that decision? How does it weigh up?

[01:19:12]

Andrew Spiers: Thanks Gerry. I mean, I guess probably at the outset for me to say is I think it's a question that we are grappling with, rather than we feel we've resolved. We've recently launched a new strategy, and I guess probably in common with pretty much every other public agency that will be doing that, thinking about the sustainability of our strategy, our organisation, how we interrelate with other organisations, everything we do needs to consider this. And I've just been struck by other sessions I've been in in the last few months about other commissioners of surveys, thinking about how they deploy fieldwork interviews, to try and reduce the number of miles they're doing to get around the interviews. For us, it's about essentially the kind of volume of paper and postage that goes on through the survey, and yeah, if we can reduce that, it feels there's an absolute imperative for us to do that, it's the responsible and right thing to do. I think the thing that's coupled with that for us as an organisation is – I'm sure we're not unique in this, but the inflationary pressures on some of these costs as well, so it's potentially good for the sort of business model of the survey as well as for the environment, to reduce the amount of paper that it produces, to reduce the amount of postage and mailing that goes on through a study, so it's something that we're actively thinking about, we haven't resolved it, I think if any of the other panellists or anyone on the call has some brilliant ideas on it, I would love to hear them.

Gerry: Ally?

Ally McAlpine: Yeah, thanks, I think, I mean, absolutely we should all, you know, in our day to day lives, we should always be trying to look at reducing our carbon footprint in all areas of our lives, but you know, there's nothing going to reduce carbon output from the UK like turning off a coal power station, you know, those are the big things that we need to do, and I think transport is not as big – and this is going back to my agricultural days, that transport is not as big a carbon emitter as other parts of the supply chains. And I would just point to, I think it was in the BBC last week about plastic in food, and actually, you know, stopping plastic has unintended consequences like food spoils quickly, you get methane emissions. So what I'm trying to say is that in all of these things, there are always trade-offs, and I think that they're not well enough understood. I think one of the things that we would want to do through the surveys though is think about how do we design better policies that lead to systemic reductions in carbon emissions from society. So I'm not particularly concerned, although when I say not particularly, I would like to think that everybody is trying to reduce their carbon footprint, but I think the scale of what we're trying to achieve through the data that we get is more important. But there are trade-offs there and we should absolutely try to reduce our carbon footprint at every step. Thank you.

Gerry: Great, thank you. Can I just check with the other panel members, is this something that's featuring in your departments as well?

Michael Dale: I can say quite simply, no, not as far as I'm aware, we've not really thought about this. And there is an overall question, obviously, the carbon footprint of a face to face survey compared to an online survey is very much greater, but that…I can't see that as being likely, other than in very marginal cases, to a reason to go down the online route if you genuinely thought that face to face surveying was necessary. I think the question that Chris Martin has raised in the chat is an interesting one, that, you know, how you actually organise your interviewing, and it relates very much to a case I saw some years ago where there was an alternative survey design proposed which used smaller primary sampling units for a face to face survey, which brought about a significant cost saving, but in fact, the effective sample size was reduced to the extent that the cost per effective survey response actually went up. So you might actually find that it's not as easy as you might hope to reduce carbon costs of an interview survey, so I would be really interested in any strategies that fieldwork agencies had thought about/tested to bring about reductions.

Gerry: And also how to measure that carbon footprint reduction sounds like it could be more complicated than we think. Michael, were you…?

[01:24:40]

Michael Dale: Yeah, I was just going to say, I don't think we're doing a great deal on this in DfE, to be frank. Part of the issue might be around the evidence as to which modes and which scales of research are more or less environmentally friendly, so it kind of feels like there should be some cross-cutting work, you know, either across government or across agencies, where we have a ready rec that helps us try and understand what the environmental impact of our proposed research model would have compared to alternatives, because yeah, obviously it's a critical thing to want to address. We have ready reckoners for costing research based on past contracts and invoices and that sort of thing, it would be nice to have a similar thing that would at least give us ballpark estimates as to how damaging or not our methods are, because yeah, I think there was a point made in the margins about does running something online on servers across the other side of the world, is that better than having, you know, three pages of A4 go out via the post? It's just…and what's the tipping point where one becomes better than the other? It's quite complicated.

Gerry: Yeah, it is a risk here that it just becomes a box ticking exercise, isn't it, this carbon reduction thing, and I think we should be wary of that and try and find better ways of measuring it. Before I move onto the last question that I have, can I just check if anyone has anything else to say about the carbon footprint? I mean, I've seen quite a few comments coming up in the chat, I can't absorb them though because I've been focusing on what you're saying, but I'm sure we're going to pick this up in the discussion again. But anything else? In which case, in 30 seconds or less, for each of you to answer what is the main thing that survey suppliers, researchers, methodologists can do to help you make better informed decisions about the commissioning and design of surveys? Who wants to go first? I'll give you a bit of thinking time.

Michael Dale: I can do the cop out answer to buy everyone else some time to have a think, which is maybe it's for us to involve the market and suppliers earlier, and have more open tenders to allow the expertise from the market to shape what we're doing, rather than coming to the market with a highly specified project which we think we've thought through well, but perhaps its better to have people on board. We do do that to a degree with market warming exercises, and that sort of thing, sort of pre-tender exercises, but yeah, perhaps a more collaborative approach to commissioning, particularly in the current context, where you know, we're asking for the moon on a stick in very

difficult industry conditions, perhaps that would be some sort of forum along those lines would be good.

Gerry: I like collaboration, that sounds good. Who wants to go next?

Mike Daly: I'll use the collaboration word as well, which is to work with the Survey Data Collection collaboration, because what we really need, I think, is authoritative, readily accessible and readily understandable information on the pros and cons of different survey approaches, partly so that we can think of them ourselves, and partly so that when we try and justify our choices to others, we've got the ammunition to hand, and a lot of that wisdom will come from the fieldwork agencies, so getting that across is going to be huge.

Gerry: Okay, thank you.

Ally McAlpine: I was going to, well, the collaboration one is absolutely key, and I'll try and do an extension of that. Tell us what you think we should be doing as well, you know, as part of the collaboration, tell us where you think the efficiencies can come from, and I think, yeah, the other thing as well I would say is that we're moving into a world where we have to be much more efficient, I think we've all spoken a little bit about that, efficient either in our carbon footprint or the amount of money that we can spend or the way in which we get response rates. So let's not…what I'm encouraging in Scotland is for us not just to think about carrying on as is, think about how can we get smarter, so work with us on that as well please.

[01:29:32]

Gerry: Great. Andrew?

Andrew Spiers: In a similar vein, I think some of the things I've valued most about working with suppliers over the years is when they've been able to share their learning from their studies, and certainly we wouldn't have gone down the push to web route so quickly if we hadn't have been sort of made aware of some of the work that we going on elsewhere in government, and that was a very good move for us. And some of the things we've done with suppliers over the course of contracts to innovate, develop, improve over the life of those studies as well has been really, really valuable to us, so yeah, again, forms of collaboration but sharing learning, best practice, so we can ask better questions, write better briefs basically.

Gerry: Great, thank you. Martina, last point…

Martina Portanti: I struggled a little bit with this one, because I can see both sides of the question here, but I think you know, reiterating really what others have said, I think that collaboration is quite key, and it needs to be genuine collaboration, and actually, I think commissioners need to trust the fieldwork agency, they don't have a secret agenda to try to squeeze more money out of it, there are certain things that they've learned from other studies that work and some that don't , and being able to share this sort of research, being a little bit alterative in terms of, you know, "This is really not going to work for you, you need to come back and think about it." I think we just need to understand each other's position a little bit better. I do find sometimes as well there is not a full understanding of actually what you can get out of people when you go out interviewing them, and we just need to be a little bit more considerate of both sides of the house.

Gerry: Great, thank you. So the time…

Ally McAlpine: Gerry, if I could be as cheeky as to ask a question back, which is what do survey suppliers think we should be doing better? What else do they need from us as well? If people want to put things in the chat, it would be great to see.

Gerry: Yeah, I think that's a good idea, so that's a question, so first of all, I was just going to say, so the title for our next meeting was going to be Collaboration, Collaboration, Collaboration, Collaboration, Collaboration, we had five times collaboration there. Just one thing I wanted to pick up with what Andrew said, that it was not just collaboration between the commissioners and the suppliers, but you also mentioned, Andrew, that you learnt a lot from other government departments as well. I was just wondering, because that's a bit of a mystery to me at some times, to what extent is there collaboration happening, knowledge sharing happening among the different departments?

Andrew Spiers: Yeah, I mean, there are…you go, Michael.

Michael Dale: No, Andrew, sorry, the question was for you, so if…

Gerry: Well, if anyone…

Michael Dale: Andrew, please go first and I'll chip in after.

Andrew Spiers: Thanks, Michael. Yeah, I mean, groups do exist, I think they've probably been, you know, more active and less active over periods of time depending on other priorities and pressures on individuals that have been central to those. I mean, the particular example I was giving, Gerry, was actually interesting, it was a supplier telling us about what work they were doing with another one of their government clients, so it wasn't , it didn't come through a formal government network. But I think we want all of the sort of eyes and ears and arms reaching into all of these things, because yeah, no network individually is going to be complete, it's how you connect into a series of networks that is probably going to give you the most useful and kind of complete picture of something.

[01:33:14]

Gerry: Yeah, no, I agree, because this is part of the answer to Ally's question then, for me as one of the suppliers, it would be a lot easier to have a network of government survey commissioners to talk to rather than individuals, so then you're having a bit more of a joined up picture happening then, and a proper sharing of knowledge. But I think I'm going to have to draw this to an end, because we have gone over time a little bit, and I want to give the audience a chance to ask you questions as well, as well as answer Ally's question, so I've given the very difficult job to Olga. She's been keeping an eye on the chat, there's lots of questions, so I'm going to have to try and capture those before we close the meeting so that can respond to that, but Olga, have you had any luck in trying to collate and pull questions together?

Olga: Well, I was looking, I was watching the chat and it was an amazing discussion going on, so to be honest, I think there were only a few questions which then were responded by the people from the audience. So I'm not quite sure, well, what I have noticed is obviously there were various examples from various surveys about mode switching and different experiments and things like that, then discussion about various, what were barriers to transitioning, for example, to online data collection, and I noticed things like bio measures were mentioned, length of the questionnaire, then also interviewer, so interview roles changing and the mobility of the workforce, of the interviewers after the post-pandemic. Also what I was really, really excited to hear, the collaboration, as Gerry, you said it was mentioned five times, and I will mention at the end

obviously there is a plan and I'm really hoping that this plan will be going ahead very, very soon, so I will mention at the very end of this meeting. I think we will definitely take forward many of the ideas which were discussed today. But going back to the chat, Gerry, when I was looking at it, I think maybe the best idea is to see if there were some questions which were not addressed yet, maybe if we open to the floor to the individuals and then they ask them, because literally there were not that many questions, there were more comments and suggestions and ideas. So I think the best way is just to open the floor to the audience.

Gerry: Sounds like a good idea to me. So if I could just ask the people who are in the audience if any of you have got an answer to Ally's question in the first instance, could you raise your hands? I don't know, Ally, if you want to repeat your question?

Ally McAlpine: It was just what would survey suppliers say to us, what could we do better, what could we…? I see somebody said more time to allow R&D in tenders, yeah, unfortunately I think we're probably hamstrung by procurement rules there a lot of the time, but I don't know if there's something…

Gerry: Oh, Ally's frozen for me, or is it me that's frozen? Oh, you're back, Ally, you froze for a second there.

Laura Wilson: Yeah, that question came from, well, that point came from me, as you've probably guessed, Gerry, but yeah, I think just reflecting upon, because I do a lot of work across government, but then also I do speak to suppliers as well through that work and a lot of the time, they would like to be doing more thorough R&D but the tenders don't allow them to do that, so I think really that change needs to come from within and we need to allow those suppliers to be able to do design and if they want to advise or be in that collaborative space, actually, we need to allow the time in our timelines to enable them to be able to advise and to say, "We need to do more R&D as well." So I think just to really improve the quality of what we're getting at the end of the day.

Gerry: I see someone's hand up, oh, Fiona Johnson.

Fiona Johnson: Thank you, Gerry, I'm Fiona Johnson, I work at the Competition and Markets Authority, and I had a question for the panel about push to telephone methodology. I'm familiar with push to web. Our recent experience of a telephone survey was not great, we wanted random digit dialled random probability sample, but the agency proposed something that wouldn't have been anything like that because they were going to top up the RDD with panel leads. They implied it was a top up, but actually, it would have essentially been a panel survey using the telephone numbers that panellists had provided. When we pushed back and said, "No, we definitely only want RDD," we found response rates were terrible, it was really hard for the interviewers to persuade people to take part, our response rate was terrible, our achieved sample size, well, no, our response rate wasn't too bad, but our achieved sample size was nothing like what we needed. So my longwinded question is how well push to telephone actually works because if we believe the agencies, people don't want to use the phone to talk to researchers anymore.

[01:38:21]

Gerry: Okay, yeah, I'll check in with, yes, Mike?

Mike Daly: Yeah, I may have slightly misunderstood the question, but I think there are different problems with different ways of doing telephone surveys. I was reviewing some of the surveys that we have been involved in, that's a couple of years ago now, and one of the clear difficulties is that most of the numbers that people use are mobile telephone numbers, and an awful lot of people will not answer a call which comes from an unknown number, so random digit dialling, I would imagine,

is hugely difficult, whereas something where there is some possibility of an initial contact saying, "Please call this number," or, "This number will call you," I think would not necessarily suffer from the same problems. So it's a point I thought of making earlier, that things can go in both directions, that at one point, telephone surveys looked like the future, and then with so many people moving to mobile phones suddenly they don't look so clever anymore. You know, there was a time when postal surveys were almost impossible because people were inundated with junk mail coming through their letter box, now they don't get that, what they get is they get spam email instead, and a letter through your letter box is a rare event to be celebrated. So you have to think about the context in which people are contacted. But I would imagine that push to telephone could be effective if you think carefully about how you make sure that people's initial contact is one that they would trust. I don't think it's about, "We don't want to talk on the phone," it's about, "I do not want to answer the phone to somebody who I do not know who is probably going to try and scam me."

Gerry: Martina, you had your hand up?

Martin Portanti: Yeah, I just wanted to say ONS clearly moved all its surveys on the telephone during he pandemic and they actually, we were expecting a drop in response rates, which we observed, but it wasn't as bad as we were fearing. And it goes back to what Mike said, it was the mode of contact, we didn't do a random digit dialling, it was literally a letter where we were asking households to get in touch with us. It's got issues in terms of bias, we did get quite a different profile of respondents, but there is something in there for the telephone. You know, going back to something else before, Gerry, in terms of some of the changes that we are carrying on, we are going back face to face, that is mainly driven by the fact that our surveys are just longer for the telephone. We go up to 60 minutes on the telephone, it is slightly too long. But it's interesting, because for example, we are being a little bit more flexible in terms of where people are busy and they can't really meet an interviewer face to face. Pre-pandemic, we wouldn't really allow that interview to happen over the telephone. These days, we've got a little bit more flexibility, because some of the concerns around the quality, there are not as high anymore. The main concern at the moment in terms of mode is how much we can squeeze through, and being able to reach people.

Gerry: Great, thank you. And Andrew, if I remember correctly, one of the reasons that the Active People Survey, when it changed to Active Lives, moved from telephone, which was random digit dialling, and went to push to web, was because the random digit dialling method was not delivering how it initially delivered?

Andrew Spiers: No, that's right, Gerry, I mean, this is obviously nearly 10 years ago now and I think probably more than that, we started thinking about making that change. But yeah, I mean, the coverage that the RDD sample was achieving was diminishing and the profile of respondents the survey was getting were a bit older and more mature, which for something like sport which is predominantly done by younger people, is problematic as well. Then we had the whole complexity of dual sampling frames because of the switch from landline phones to mobile phones, the potential to select people twice within your sample, for us, we wanted to achieve that local authority level estimate, how on earth do you know where a mobile phone is going to ring in the country if you just are randomly selecting them, or even if it is going to, for us, ring in England, let alone, you know. So there are a whole range of things which made it difficult for us. But I think it's slightly different, perhaps to the sort of push to phone approach that perhaps was initially in the original question, but yeah, it was, there was a range of reasons it was right for us to move away from that landline design, yeah.

Gerry: Okay, yeah, and I think if anyone is interested in the push to telephone approach, I believe that ONS has produced a report, I think it came out last year, which compared the sample profiles across a number of its surveys that had moved to push to telephone. So I'm afraid I don't have the link to hand, but there is information available on that if you want that. Any other questions from the audience?

Olga: I think Claire Wardman, she placed a couple of questions and I saw the hand was raised, but then it disappeared, so I'm not quite sure, Claire, if you would like maybe…?

Gerry: I think…I can't see…oh.

Olga: No, I can see she's here, yeah.

Gerry: Oh yeah.

Olga: Claire?

Claire Wardman: Hi, I'm here, I can't think what my question was, to be honest. In the discussion, you've answered quite a lot of questions, I know I've been to seminars where ONS have been talking really helpfully about the differential response rates to different modes, which has been incredibly helpful. And the other thing that I put in the side bar was about when I used to work at the Scottish Executive, and we used to have these open days, I can't remember what they were called, but where we had suppliers and academics in, and we discussed our upcoming research needs, and they would explain their thinking constraints, and we would explain our thinking and constraints and our ministers' kind of priorities. And they weren't …they were quite difficult, no, not difficult, they were…what's the word?

Gerry: Challenging?

Claire Wardman: Well, I don't even know whether challenging is the right idea, they were constructive, I think, so you know, it was…different people explaining their points of view on the same kind of problem, but it was so, so incredibly helpful for everybody understanding where we were aiming towards, and the constraints within which we were operating, and they really were… So these were just, you know, these were potential suppliers, they weren't existing suppliers, they were all the big companies, all the big research companies, agencies, consultants and academics, and it was just so, so helpful to listen to what their views on the existing evidence and forthcoming policy issues were, versus government's, and what our priorities were and what our constraints were and what our ministers' priorities were, and I don't know whether we do that anymore, and obviously in the Scottish Executive, way back when, that was a pan-nation thing. So you know, there's not loads of different departments in Scotland, I don't know whether there's any…I don't know, capacity at all or inclination to do that across government.

Gerry: I think…I sort of just notice that Ally seems to have disappeared, so he might have had another meeting to go to, I'm not sure, or there's technical problems, because otherwise I would have asked him to jump in, but I do believe that last week, the Scottish Government, it might have been the Scottish Government and some other group hosted a session and suppliers were there as well talking about these kinds of issues and what the long-term impact of the pandemic has been on survey data collection in Scotland. So I think there is, it seems to be a lot of appetite for this, as demonstrated by the panel members and this sort of collaboration. I think this is probably a good moment, if there are no other questions, I can't see anyone's hand raised, this is probably a good moment to hand over to Olga, because of course, Olga, you were going to say something

about what's happening after SDC-Net, because I think there is definitely a need for more collaboration and sharing of knowledge. Olga.

[01:46:57]

Olga: Thank you so much. Now, first of all, I really would like to say a massive thank you to Gerry for leading and chairing this fantastic discussion and to all panel members, that was really, really interesting, so many interesting points, and I'm sure lots of things we will take forward in the what I will…in the next project hopefully. Thank you all very, very much, and thank you to the audience because it was a really interesting discussion happening in parallel on the chat, and I'm hoping to be able to read through it in detail after this event, so thank you all very, very much. As Gabby mentioned, obviously this is our final event for SDC-Net, however, well, Gabby already mentioned this as well, we have lots of plans and lots of ideas for the next activities, what will happen next, and we are currently in the process of finalising the large grant which is called Survey Data Collection Methods Collaboration, and hopefully will be funded by ESRC, which involves more than 30 colleagues from 16 institutions in the UK. And so, what we're hoping that this exciting project will start some time mid-April to early-May and then we will be able to start announcing various events and various activities, but we are waiting for finalising the contract with the ESRC. So we really hope that all of you will continue contributing and supporting our forthcoming activities, but I guess I'm not quite sure I can say more at this stage, because we're still waiting to hear final details. But for now, I would really like to say to all network members, to all people who attended our events, who contributed to our events, a huge thank you for all the contributions over the last year and a half, and I really hope to see you all again very, very soon in our forthcoming events. Thank you all very, very much.

[End of Transcript]