



Centre for Longitudinal Studies
Institute of Education



A Research Networking Programme financed by



Tracking sample members in longitudinal studies

**EUCCONET International Workshop Thursday 1st and Friday 2nd July 2010
London, UK**

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Abstract

Longitudinal studies follow the same sample members over time. In order to do this, they need to track people who move address. This distinctive and unifying feature of all longitudinal studies usually requires considerable investment of resources. This workshop will share best practice in this crucial area.

Scientific Summary

One of the main analytic benefits of longitudinal surveys is that they offer researchers the opportunity to study change over time. Attrition from longitudinal surveys can lead to bias in the findings from the study if sample members who drop out over time are systematically different to those who remain in the study. A particular concern is that if the factors associated with sample loss are themselves associated with the substantive processes which the study is aiming to measure over time, this can lead to biased estimates of change. Lepkowski and Couper (2002) distinguish between three different sources of attrition: failure to locate, failure to make contact having located and failure to co-operate having contacted.

This workshop focuses on the challenge of minimising sample attrition due to failure to locate. The problem of locating sample members in longitudinal surveys is related to individual's propensity to move and, conditional on moving, to be located. One of the main reasons that longitudinal studies aim to track sample members who move is that the dynamics of residential mobility, and the processes related to it such as relationship and employment change, are of substantive interest and failure to locate sample members who move may lead to biased estimates of change in these and other important domains.

The motivation for this workshop comes primarily from a paper by Couper and Ofstedal (2009) which was originally presented at the International Conference on the Methodology of Longitudinal Studies at the University of Essex in 2006. The authors offer a general model to help understand the location process which hypothesises that the main factors affecting the propensity to move are person-level

factors such as age, family circumstances, employment and housing situation, and societal-level factors such as the general level of mobility and degree of urbanisation. The propensity to be located, on the other hand, is influenced by survey design factors, such as the interval between waves and tracking procedures and structural factors, such as the availability of population registers, mail forwarding rules and the portability of phone numbers. Couper and Ofstedal provide a review of the literature in relation to the likelihood of moving showing that mobility rates vary both within and between countries and that a variety of demographic and socio-economic factors are associated with mobility. They also discuss the structural factors and survey design factors which are likely to be associated with the ability to locate sample members who move. This includes a useful review of tracking procedures which are commonly employed on longitudinal surveys which distinguishes between retrospective tracking, designed to find sample members with whom contact has been lost and prospective tracking, designed to prevent the loss of contact by keeping details up to date and between office and field based tracking. The substantive focus of the paper is an examination of the location problem in the context of two longitudinal studies: the Panel Study of Income Dynamics (PSID) and the Health and Retirement Study (HRS). The authors note that although most longitudinal surveys devote considerable resources to tracking mobile sample members and have developed highly successful procedures for minimising attrition through failure to locate, there is relatively little methodological evidence on the relative success, and cost-effectiveness, of different tracking procedures.

The workshop will bring together those running longitudinal studies around the world in order to share experiences and best practice in relation to tracking procedures. It will include the presentation of the most recent methodological evidence in this area (Calderwood, 2010; Fumagalli, Laurie and Lynn, 2010; McGonagle, Couper and Schoeni, 2010) and provide a forum for stimulating ideas for new and comparative methodological research.

The programme for the two-day workshop includes 17 substantive presentations. The vast majority of the presentations will be from child cohort studies based in Europe (11), USA (2) and Australia (1). There will also be presentations from household panel studies based in Europe (1), USA (1) and Australia (1). The rationale for the inclusion of panel studies as well as cohort studies is that the location problem is a common problem in all longitudinal studies. This workshop offers a forum for different types of longitudinal studies from around the world to learn from each other. The broad range of countries and types of study represented at this workshop will provide an excellent opportunity for new insights into the importance of societal and life-course factors influencing the propensity to move and structural and survey design factors influencing the propensity to be located identified by Couper and Ofstedal (2009) in their model of the location process.

References

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Survey Practice