

SURVEY FUTURES

SURVEY DATA COLLECTION
METHODS COLLABORATION

Survey Futures: Emerging recommendations and Future challenges

6th Survey Practice Forum, 18th May 2026

Peter Lynn (University of Essex) & Olga Maslovskaya (University of Southampton)



Programme

- 10.00-11.00 – Introduction and presentation of emerging recommendations – Peter Lynn and Olga Maslovskaya
- 11.00-11.40 (40 minutes) – breakout group discussions on community’s key research objectives:
 - What are the most useful or insightful pieces of evidence produced by Survey Futures for your organisation so far?
 - What are the key areas for future work to address knowledge gaps in survey design or practice?
 - Please rank these areas as high, medium, or low priority.
- 11.40-12.10 – feedback and reporting of key ideas from the breakout groups
- 12.10-12.30 – whole group discussion on next steps and concluding remarks

Survey Futures



- A multi-institutional research programme focused on ensuring that high-quality surveys in the UK can innovate and adapt in a fast-changing survey data collection landscape.
 - **Overarching Aim:** To deliver a step-change in survey research to ensure that it will remain possible in the UK to carry out high quality social surveys of the kinds required by the public and academic sectors.
- A collaboration between nine universities, and three survey agencies (NatCen, Ipsos, and Verian), in partnership with the Office for National Statistics (ONS) and the National Centre for Research Methods (NCRM).
- The programme includes over 60 researchers working across nine research strands, investigating the most significant topics of survey research.
- Visit our website: <https://surveyfutures.net/>

Outputs to Date



13 Evidence Reviews (<https://surveyfutures.net/reports/>)

3 Reports on future of face-to-face interviewing

7 Survey Practice Guides (<https://surveyfutures.net/practice-guides/>)

17 Working Papers (<https://surveyfutures.net/working-papers/>)

8 Good Practice Workshops (<https://surveyfutures.net/events/>)

2 ECR conferences

Early career impact awards (<https://surveyfutures.net/news/2025/06/18/survey-futures-early-career-impact-award/>)

Survey Futures Position Statements



*Already **published**:*

- Response rates <https://surveyfutures.net/publications/response-rates-position-statement/>

Under development:

- Future of face-to-face interviewing
- Technical reporting

Survey Futures Position Statement on Response Rates



<https://surveyfutures.net/publications/response-rates-position-statement/>

- Survey quality is important
- For years response rate was a key survey performance indicator and was often interpreted as the sole or most important measure of survey quality, which is misleading!
- Response rates are not a reliable indicator of non-response bias
- Survey with low response rates can still produce high-quality data and the reverse can also be true
- Non-response bias is a key component of survey quality
- Non-response bias should be assessed
- Response rates still have a role as a measure of *process* quality
- Striving for high response rates remains important: focus should be on achieving similar response rates across population sub-groups rather than aiming for a high overall response rate

Research Strands



Research Strand 1: Enhanced Sampling Frames and Procedures (Prof Paul Smith)

Research Strand 2: Post-Pandemic Role of Field Interviewers (Debbie Collins)

Research Strand 3: Video Interviewing (Matt Brown)

Research Strand 4: Methods for Surveys without Field Interviewers (Prof Olga Maslovskaya)

Research Strand 5: Complex Measurement in Self-completion Surveys (Prof Lisa Calderwood)

Research Strand 6: Reducing and Evaluating Mode Effects (Jo d'Ardenne and Prof Annette Jäckle)

Research Strand 7: Data Integration (Prof Alex Cernat)

Research Strand 8: Addressing Non-response (Prof Gabriele Durrant and Dr Alessandra Gaia)

Research Strand 9: Generative AI for questionnaire design (Prof Patrick Sturgis)

Research Strand 1: Enhanced Sampling Frames and Procedures

SP1 frames – Recommendations

- AddressBase may improve on PAF, but benefits are not systematically evaluated and additional classification data are not error-free.
- Sampling of people with certain characteristics using admin data is possible (e.g. Early Life Cohort from health records) but access and ethical approvals require substantial efforts.
- Linkage to admin data: technical capabilities are improving but remain limited without a common identifier, and conditions for access to the data in a suitable form remain challenging.
- A general framework of linked administrative data for sampling purposes is not yet feasible.
- It is unlikely that the UK will have a population register for the foreseeable future, but ONS is developing the Reference Data Management Framework (RDMF), a data infrastructure built from several administrative data sources and providing almost complete population coverage for England and Wales. The RDMF is intended for secure data linkage to support analysis and currently not for survey design and implementation.
- The RDMF offers potential to support the inclusion of those living in non-private residences, better stratification, oversampling of small or analytically important sub-groups, reduction in non-response bias through targeted and tailored fieldwork efforts, reduced respondent burden by replacing questions with admin data, enhanced auxiliary information for weighting and calibration
- The RDMF produces a substantial reduction in total survey costs.



Research Strand 1: Enhanced Sampling Frames and Procedures

SP1 frames – Future challenges

- Systematic comparison of AddressBase with PAF as a sampling frame
- Continue efforts to build the conditions under which a sampling frame with linked administrative data could be possible.
- Improved communication between all stakeholders
- Major methodological, operational, and ethical shifts to enable the RDMF to support more person-centred sampling approaches

Research Strand 1

SP2 prob and non-prob - Recommendations

- Many methods available for combining probability and nonprobability data, including machine learning and Bayesian framework.
- Different methods suit different data structures, the most important consideration being which sample has the outcomes of interest.
- In practice, the method is of secondary importance compared to the availability of covariates (common to both datasets) that can explain the selection mechanism in the non-probability sample.
- Key conclusion: there is little evidence regarding the performance of these methods in real world settings, especially relative strengths and weaknesses in different scenarios.

Research Strand 1

SP2 prob and non-prob - Future challenges

- Addressing coverage error in non-probability samples remains under-explored and needs methodological development.
- Improve methods for producing estimates for sub-groups.
- Develop approaches to integrate new types of non-probability samples with potentially very different data generation mechanisms, such as samples recruited from social media.

Research Strand 1

SP3 RDS - Recommendations

- RDS is promising for cost-effectively boosting, reaching, or improving the representation of small or 'hard-to-reach' populations
- Applications of RDS in high quality national surveys are limited, with little guidance on good practice or robust evaluation of data quality
- Recent studies have demonstrated the feasibility of RDS, but questions remain about mitigation of risks related to protocol non-compliance, violation of assumptions, and statistical adjustments

Research Strand 1

SP3 RDS - Future challenges

- Future research should broaden the evidence base on:
 - how to best implement RDS in high-quality surveys in a range of contexts,
 - how best to mitigate risks,
 - how data quality compares to alternative approaches (e.g., probability samples and convenience samples).

Research Strand 2: Post-pandemic role of interviewers

Recommendations and Future challenges



- Continued investment in maintenance of F2F interviewing infrastructure
- High-level interviewer training
- Strengthened relationship between commissioners and interviewers
- Forecast future demand for F2F surveys to identify the tipping point at which they may become unsustainable
- Develop a clear, evidence-based case that helps survey commissioners successfully argue for funding F2F interviewing

Research Strand 3: Video-interviewing

Recommendations

- Video interviewing (VI) is feasible and produces data of comparable quality to F2F interviews
- VI is best used as a complementary mode rather than a replacement for in-person interviewing. It works effectively within mixed-mode designs and can support accessibility and inclusivity.
- Offering VI may help retain participation from some groups but does not consistently improve representativeness.
- VI is particularly well suited to longitudinal designs, where prior contact, established relationships and existing contact details facilitate uptake.
- VI can successfully support complex interviewer-administered tasks, including cognitive assessments and requests for consent to data linkage.
- VI has potential to reduce fieldwork costs, primarily through reduced travel time and expenses.

Research Strand 3

Future challenges

- **Mode uptake and response rates:** Understanding participation patterns when VI is offered alongside other modes.
- **Mode switching in longitudinal surveys:** Examining how switching between video and in-person modes affects measurement comparability and estimates of change over time.
- **Best practice and technology:** Evaluating interviewer training approaches, fieldwork procedures, and technological developments to optimise VI.
- **Integration of VI technology into self-completion questionnaires:** Assess the potential to use recorded video functionality as an alternative to written questions to improve inclusivity (e.g., for low-literacy groups).

Research Strand 4: Methods for Surveys without Field Interviewers

SP1 recruitment - Recommendations



- **Self-completion surveys are viable for UK probability-based general population surveys**
- **Communication strategy:** Pre-notifications, two or three reminders, shorter intervals between contacts are effective. Messages based on social exchange theory (emphasising legitimacy and low burden) outperform personal appeals. University logos are more effective than government or commercial.
- **Materials and access:** Envelope design has limited impact, except that windowed envelopes displaying a cash incentive improve recruitment. While URL access is dominant in UK practice, offering multiple access options (including QR codes) can improve response.
- **Survey mode:** Mixed-mode designs can improve response rates, increase representativeness, and reduce survey costs compared to single-mode surveys.
- **Incentives:** Aid response and representativeness. Monetary (e-vouchers) are most common in the UK. Conditional incentives often preferred but unconditional more effective. A combination of both is optimal. Differential and early-bird incentives can successfully engage harder-to-reach groups.

Research Strand 4

SP1 recruitment – Future challenges

- **Implementation gap:** UK practitioners generally follow evidence-based guidelines, but real-world implementation faces budget and time constraints. Strategies should balance methodological rigour with fieldwork feasibility.
- **Innovative recruitment methods** (e.g., targeted approaches for harder-to-reach groups, alternative questionnaire access and response options, and differential incentives) are sometimes used. Further research should evaluate their effectiveness.
- **Survey technical reports** are a key resource for researchers and data users. Standardisation in reporting across surveys is needed.

Research Strand 4

SP2 targeting - Recommendations

- Effective targeted features include invitation letters, between wave mailings, knock-to-nudge visits, mode assignment, incentive value, extra incentives, and incentive timing.
- Studies of targeted designs conducted on face-to-face surveys can inform targeting for self-completion contexts if the studied features are aimed directly at the respondent.
- Targeting with address-based samples is feasible, using geographically-linked data.

Research Strand 4

SP2 targeting – Future challenges

- Secondary analysis of data from experiments where effects can be compared between sub-groups can simulate the effect of targeting and help identify effective designs.
- Evaluation of the relative performance of different data sources and different variables for defining groups to target when using address-based samples and linked data.
- Improving the effectiveness of already tested features (e.g., optimum design of targeted communications).

Research Strand 4

SP3 inclusivity - Recommendations

- **Including populations with participation barriers** requires offering alternatives in both recruitment and administration. The choice of measures depends on survey objectives, scope, scale, and budget.
- **Basic measures** should be prioritised in all surveys: accessible questionnaire design and content, easy read/simple language (average reading age in the UK is nine), short and concise materials
- **Higher-cost measures** may be needed where excluding certain groups is a significant concern: e.g., offering an interviewer-led mode in mixed-mode designs (to aid those with visual impairments, some neurodevelopmental conditions, or low literacy); providing professionally translated materials (for linguistic minorities).
- **Specialised measures** (e.g., audio questionnaires, video surveys, tailored apps) may benefit specific groups but can be prohibitively expensive and may not noticeably reduce total survey error. Use should be reserved for when those groups are a priority.

Research Strand 4

SP3 inclusivity – Future challenges

- **Impact of inclusivity measures.** Further research is needed on how inclusivity measures affect non-response bias, sample composition, data quality, and costs.
- **Cost-effectiveness of inclusivity measures.** Cost-effectiveness of inclusivity measures should be evaluated: trade-offs within constrained budgets.
- **Decision-making frameworks.** Explore how to prioritise inclusivity efforts (e.g., which group(s)) and how to balance inclusivity against precision when budgets are limited.
- Further research is needed on how best to engage **low-literacy groups** in self-completion surveys, as well as on the long-term effects of inclusive design on retention, trust, and data quality in longitudinal studies.

Research Strand 4

SP4 knock-to-nudge - Recommendations

- Knock-to-nudge (KtN) can improve response rates and sample composition by reaching under-represented groups.
- However, these benefits must be balanced against higher fieldwork costs and potential data quality risks, including higher levels of item non-response and “don’t know” responses.

Research Strand 4

SP4 knock-to-nudge – Future challenges

- There is a need to experimentally compare the two distinct KtN strategies (all non-respondents or targeted non-respondents) and their effects on response rates, sample composition and data quality.
- KtN is a resource-intensive method for participant recruitment so cost analysis should be conducted.

Research Strand 4

SP5 within-household selection - Recommendations

- Reinforcement mechanisms such as verification questions improve selection accuracy, but can slightly reduce response rates.
- Multi-respondent designs introduce clustering effects that reduce statistical precision but also reduce unit costs.
- The “any two” method is around 20% less costly per completed questionnaire and 10% less costly per effective questionnaire than “next-birthday” method.
- Multi-respondent approaches increase risks of non-compliance and fraudulent responses, though procedural restrictions can mitigate these risks without lowering response rates.
- The “any two” method is preferred, but the “next birthday” method is also acceptable.
- A Tailored Design Method letter style and the “any two” method can be safely implemented together to reduce costs without compromising survey quality compared with a birthday method.

Research Strand 4

SP5 within-household selection – Future challenges



- Improve understanding of the properties of the “any-two” method and achieve acceptability as a high-quality method.

Research Strand 5: Complex Measurement in Self-completion Surveys

SP1 occupation coding - Recommendations



- Manual office coding of open-text job descriptions remains the most reliable approach, and is still widely used, despite cost and time requirements.
- Self-coding approaches (look-up tools during the survey) are promising but typically result in lower coding rates and only moderate agreement with office-coded classifications.
 - Look-up based approaches would likely be best used in combination with office-based coding
- Automated coding methods are developing rapidly, including machine learning and LLM based approaches, but do not yet consistently match the accuracy of manual coding and often still require review from office coders.

Research Strand 5

SP1 occupation coding – Future challenges

- Further evaluation of self-coding approaches in self-completion (including hybrid systems in which self-coding is supplemented by selective office-based manual coding) to assess impacts on coding accuracy, respondent burden, and agreement with office coding.
- Development and testing of *simplified occupational codeframes* for self-completion surveys, using plain language labels to support respondent self-coding while maintaining compatibility with standard occupational classifications.
- Development and testing of AI- and LLM-based automated coding tools, encompassing two key approaches: (1) using ML or LLMs to code open-text responses, and (2) using LLM-based interfaces that interact with respondents during data collection (e.g., through probe questions) to elicit more detailed information and improve coding accuracy.

Research Strand 5

SP2 cognitive assessment - Recommendations

- In mixed-mode surveys, cognitive tests should be administered through self-completion, to maintain comparability across modes.
- Calibration studies are recommended when transitioning from interviewer-administered to online assessments, allowing researchers to quantify and adjust for mode differences.
- Survey implementation should prioritise usability and accessibility, including clear instructions, practice tasks, intuitive interfaces, and support for respondents with lower digital literacy.

Research Strand 5

SP2 cognitive assessment – Future challenges

- Further validation of online cognitive test batteries for reliability across devices, screen sizes, and internet conditions is essential.
- Mode effects in cognitive assessments conducted in mixed-mode surveys, both for measurement and post-survey adjustments, is necessary.
- Development and evaluation of novel measurement approaches, including gamified cognitive tests and smartphone-based assessments, is encouraged.
- Survey response paradata as proxies for cognitive functioning should be explored: assess strength and robustness of associations.
- Assessment of device-related effects on cognitive performance is needed.

Research Strand 5

SP3 retrospective life events - Recommendations

- Retrospective calendars can improve recall quality, as visual structure helps to contextualise events, particularly for life history data.
- Pre-loading information from previous waves or earlier responses can improve recall accuracy and reduce burden in longitudinal surveys.
- For shorter time periods, questionnaire-based retrospective modules are feasible and easier to implement. However, for longer periods they generally produce less accurate data.

Research Strand 5

SP3 retrospective life events – Future challenges

- Understanding of usability, response burden, and data quality for self-administered retrospective calendars in online surveys.
- Evaluation of device compatibility and interface design, especially for calendar instruments on mobile devices.
- Understanding of relative performance of different retrospective data collection methods, including calendars, conventional questionnaires, and event-triggered approaches.
- Understanding how instrument complexity and sensitive topics influence breakoffs and data quality in retrospective online surveys.

Research Strand 5: Complex Measurement in Self-completion Surveys

SP4 consent to data linkage - Recommendations



- Obtaining consent remains a key challenge, especially in web surveys, and non-consent can introduce bias and limit the usefulness of linked datasets.
- UK online and mixed-mode surveys continue to use fairly standardised consent procedures, with similar design features applied across studies: additional information (often an invitation leaflet and/or a study webpage), include a brief on-screen explanation of what linkage involves (why it is being done, which data sources and organisations are involved, what personal details are used for linkage, and how confidentiality is protected), and then ask for opt-in consent.
- Consent questions are usually placed towards the end of the questionnaire
- Exception: some government surveys and surveys conducted by the Office for National Statistics, where explicit opt-in consent is not always required and consent to linkage may instead be embedded within general survey participation.



Research Strand 5

SP4 consent to data linkage – Future challenges

- Limited robust evidence on how to improve consent rates in web surveys
- Further research needed on design features such as placement, wording, and framing of the consent question in SC surveys
- More innovative approaches should be explored, including incentives, opt-out or embedded consent models, and targeted follow-up of initial non-consenters.

Research Strand 6: Mode Effects

Reducing mode effects - Recommendations

- Use a structured framework to identify and mitigate measurement risks when transitioning to online or mixed-mode surveys, focusing on key factors: interviewer effects, respondent satisficing, and presentation effects. The framework flags risks and provides practical mitigation strategies.
- Grid formats introduce inconsistencies across devices, increase straightlining and break-offs, and are best replaced with scrolling or unfolding layouts.
- A mobile-first approach to questionnaire design is essential.
- Pre-testing — particularly cogability testing — ensures that questions remain interpretable and navigable without interviewer support.

Research Strand 6

Reducing mode effects - Future challenges

- To better understand why rating scales behave differently across modes
- To explore how to deliver multiple short CASI modules within CAPI interviews without compromising field operations.
- Optimal handling of 'Don't know' and 'Refusal' options in web surveys remains unresolved
- Smartphone-specific questionnaire design to address scrolling behaviour and break-off dynamics.
- Further develop use of LLMs to support coding of open-text responses, including use in routing logic.
- Understanding satisficing behaviours across devices.
- Evaluating the cumulative impact of automated prompts when deployed at scale.
- Assessing the long-term implications of mode transitions for preserving time-series integrity.

Research Strand 6

Impact of mode effects - Recommendations

- Many survey items *do not* display mode effects, others typically show small effects.
- Mixed-mode survey designs can in principle cause bias in associations between variables, yet this requires strong mode effects and/or mode selection, - unlikely in practice.
- Empirical studies showed that associations between variables are little changed in two sequential mixed-mode datasets when experimental mode effect estimates are incorporated.

Research Strand 6

Impact of mode effects – Future challenges



- Simulation work to understand the effect of introducing mixed-mode designs on longitudinal analyses.

Research Strand 7: Data Integration

Recommendations

- Surveys should more often exploit alternative data sources that contain information that can explain why people do not participate
- Use geospatial gridded methods to update sampling frames and enable more efficient sampling, adaptive designs and non-response correction
- When selecting external data to integrate, look for consistency in variable definitions, time reference, geographical coverage and measurement properties
- Adaptive and targeted designs using integrated data could be used more effectively

Research Strand 7

Future challenges

- Optimising questionnaire design: reducing respondent burden by integrating administrative records for routinely collected variables such as benefit receipt, PAYE and tax
- Sharing lessons from working with linked data as well as implementing adaptive survey designs.
- The process of data linkage is complex, expensive and takes a long time. As a community we should continue to advocate for policies and infrastructure to facilitate this process to make the most of the available data in the UK.

Research Strand 8: Addressing Non-response

SP1 differential incentives - Recommendations

- Widespread use of differential/targeted incentives in UK surveys, including demographic targeting, prior response history, area-level deprivation, early-bird incentives, and, in some cases, non-response conversion strategies
- Use of differential incentives should be openly documented: design and outcomes

Research Strand 8

SP1 differential incentives – Future challenges



- Experimental research to robustly evaluate incentive designs and outcomes
- Strong need for continued collaboration to share best practice (especially as evidence is not always publicly available)

Research Strand 8

SP2 non-response follow-up – Recommendations and Future challenges



- Interviewer follow-ups to online surveys no longer provide substantial improvement to sample composition and are therefore not cost-effective for representational purposes
- For longitudinal surveys, interviewer follow-ups still improve statistical power and are therefore still recommended
- Surveys should continue evaluating the impact of non-response follow-ups

Research Strand 9: Generative AI for questionnaire design

Recommendations

- LLMs can produce substantial time and cost savings in the measurement of occupation and similar variables that require coding open text responses to large coding frames
- LLMs can be used effectively to identify problems in draft survey questions

Research Strand 9

Future challenges



- Understanding how prompt architecture, model choice and model temperature affect classification accuracy
- Understanding how LLM question testing tools work in real world questionnaire development environments

Training and Capacity Building

Key recommendations



- Limited pool of methods trainers constrains capacity; exploring Doctoral Training Partnerships and networks of methods trainers to build capability
- Key training gaps in data quality and AI
- Suggestion that grant funders should require applicants to include statements on data quality as part of data management plans.
- Exploring revival of the Survey Link Scheme (or similar) to strengthen collaboration and capacity

Training and Capacity Building

Future challenges



- Rapid pace of AI development risks making learning pathways quickly outdated; further work is needed to keep them relevant

Programme – breakout groups

- 11.00-11.40 (40 minutes) – breakout group discussions on community's key research objectives:
 - What are the most useful or insightful pieces of evidence produced by Survey Futures for your organisation so far?
 - What are the key areas for future work to address knowledge gaps in survey design or practice?
 - Please rank these areas as high, medium, or low priority.
- 11.40-12.10 – feedback and reporting of key ideas from the breakout groups
- 12.10-12.30 – whole group discussion on next steps and concluding remarks

Questions for Breakout Group Discussions

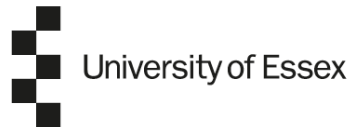
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- Please rank these areas as high, medium, or low priority.



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Breakout Groups



Other Plans

- International Conference – London – 17-18 June 2026
<https://surveyfutures.net/international-conference/>
- Edited book (Editors: Peter Lynn and Olga Maslovskaya): *The future of social survey data collection*
- JRSSA Special Issue (Guest Editors: Peter Lynn, Olga Maslovskaya, Barry Schouten, Ian Diamond): submission deadline 15 June 2026

SURVEY FUTURES

SURVEY DATA COLLECTION
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Thank you!

<https://surveyfutures.net/>

