



**Options for a new longitudinal household survey in
New Zealand:
Summary of feedback on draft “Issues and Options”
paper, July–August 2012**

Dave Maré and Ron Crawford

Motu Economic and Public Policy Research
May 2013

1. Background

In July 2012, Dave Maré from Motu Research circulated a paper that outlined options for initiating a new longitudinal household survey in New Zealand, and discussed a range of related issues.¹ Feedback was invited from a range of interested parties. A brief set of prompts was provided to stimulate feedback, though was not intended to constrain the scope of feedback. A copy of the prompts is included as Appendix One.

A half-day workshop was held in Wellington on 20 August 2012. At the workshop, Dave Maré provided an overview of the issues and options and of the feedback received. The workshop also included a presentation by Mark Wooden, the Director of the Australian HILDA study, on ‘Lessons from HILDA’, and a Statistics New Zealand presentation on ‘Longitudinal data - Recent Experience and Future Direction’ by Anton Samoilenko. All of the workshop materials, together with this summary of feedback, are available at http://www.motu.org.nz/research/detail/longitudinal_household_survey.

A final version of the ‘Issues and Options’ paper is available as Motu Working Paper 13-04 (http://www.motu.org.nz/publications/detail/issues_and_options).

The current paper summarises feedback received on the prospect for a new longitudinal household survey. It provides a balanced account of the range of feedback received, and summarises the main points made by respondents. In many places, we have included quotations from respondents, indicated by italicisation and quotation marks.

2. Who provided the feedback and what position did they take?

Feedback was received from 33 individuals, academic institutions, government departments and independent research institutes (listed in Appendix Two).

- Almost 80 per cent (26) supported a new longitudinal household survey (LHS) in New Zealand (eight with reservations).
- Just over 20 per cent (7) were either uncommitted or dubious.

Those with reservations or doubt had mostly similar concerns:

¹ The draft “Issues and options” paper was prepared by Ron Crawford, on contract to Motu Research. Funding for the preparation of the “Issues and options” paper, and for the August workshop, was provided by Statistics New Zealand, the then Department of Labour (now part of the Ministry of Business, Innovation and Employment), the NZ Treasury, and Motu Research. Previous funding was provided by the Motu Foundation. The views expressed in this paper are those of the authors or the respondents and do not necessarily reflect those of the funders. In particular, funding support does not necessarily imply a position on whether a new longitudinal household survey should be established in New Zealand.

- Questioning whether alternative sources of data (such as longitudinally linked administrative data, or ensuring the ongoing viability of the Growing Up in New Zealand Survey [GUINZ]) deserved a higher priority;
- The need to clarify the priority of a new LHS relative to Official Statistics priorities;
- The need to demonstrate value for money (and, relatedly, the need for clarity of research objectives) and
- Concerns about the availability of skills to analyse data from the survey.

Generally supportive comments included:

- *“The paper convinced me of the need for a HPS [Household Panel Survey]! I think the argument is compelling actually”*
- *“We support [a] household panel survey; we like the HILDA (Household Income and Labour Dynamics in Australia Survey) model”*
- *“Such a data collection would present many useful research avenues”*
- *“The potential contribution of a well-designed HPS [Household Panel Survey] to causal inference is very significant, and such inferences are critical to good social settings and policy”*
- *“Longitudinal collections are a key requirement for improving national (and international) measurement systems ... which failed so dismally in the lead-up to the current financial, economic and social crisis.”*

Generally doubtful comments included:

- *“The paper is quick to denote the solution . . . The case for such a large investment needs to be more compelling”*
- *“unlocking useful existing statistical material seems a far more feasible and cost-effective approach”*
- *“. . . I imagine that the cost might be an enormous barrier in the current fiscal climate”*
- *“We are in danger of proliferating stand-alone studies that then cannot be sustained”*

3. Which policy and research domains?

Respondents identified a broad range of domains. Discussion at the workshop highlighted the importance of being able to examine households’ experiences across multiple domains.

Research domains that would be informed by a new LHS include (most are domains covered by the existing recognised international LHSs):

- | | |
|--------------------------------------|------------------------------------|
| • Employment | • Taxation and income support |
| • Income, expenditure , indebtedness | • Savings and wealth accumulation |
| • Health and wellbeing | • Financial literacy |
| • Education and Training | • Family formation and dissolution |
| • Housing | • Poverty dynamics |
| • Child outcomes | • Youth transitions |

- Retirement transitions
- Intergenerational persistence/ mobility
- Migration/ Location choice
- Immigration settlement
- Trans-Tasman mobility

4. What core content?

Core content generally means the content that should be covered in each wave of an LHS, or at least with a frequency that adequately captures relevant changes. Some data (e.g. family histories) might be collected once for baseline purposes. Respondents identified:

- Demographics (age, gender, ethnicity)
- Employment (standard and non-standard)
- Income
- Education (attainment and participation, formal and informal)
- Family and Household dynamics
- Health status (physical including obesity, and mental)

Respondents suggested that data should be collected as event histories (where relevant) to enable reliable spell data to be constructed. It is important that the measurement of variables is harmonised for cross-national comparisons, and also that content can respond quickly to emerging issues.

5. What additional content?

A wide range of possible additional content was identified (with respondent burden being managed by administering some content less frequently or only to sub-samples):

Suggestions for additional content included:

- Psycho-social attributes/ Non-cognitive skills (personality/ attitudes/ behaviours)
- Measures of well-being
- Career aspirations
- Work-life balance
- Health risk factors (smoking, alcohol, diet, activity)
- Discrimination
- Disability
- Childcare
- Literacy
- Household wealth – accumulation and decumulation
- Financial literacy
- Housing tenure, quality and expenditures
- Geocoding
- Environmental variables and interactions with the environment
- Sources of funding for tertiary education
- Education/ work experience abroad
- Transport and travel: domestic and international

- Immigrants: country of birth, language, visa category, length of stay and settlement.
- Participation in Government programmes (e.g. labour market, income support, student loans, Kiwisaver, paid parental leave)
- Information on household finances from bank statements and other financial records (consent being obtained at the first interview, thus reducing subsequent respondent burden).
- Biometric (BMI, grip strength, cheek swabs, but “don’t draw blood!”)

Some respondents suggested that LHS data could be linked to *administrative data* (such as health data and tax data), subject to informed consent. SoFIE provided a New Zealand example of such a link (with health administrative data) being established successfully, with an over 80% acceptance rate. More stringent protocols for user access to administrative data would likely be needed, depending on its nature. Some thought that it would be better to wait for confidence in the survey to be established before members were asked for consent to links to administrative data. HILDA has not pursued links to administrative data because of potential risks to response rates and attrition.

Again, it was felt that the design should exploit the multi-disciplinary advantages of data from an LHS so that interactions and links across domains and over time can be explored. For example, this could include the relationships between demography and labour markets, or between attitudes and values and objective outcomes.

6. The sample

Respondents contributed views on several aspects of survey and sample design. The summary of responses presented here captures the more specific of the comments.

6.1. Size

- Sufficient to support sub-group, sub-regional, analysis
- A minimum of 5,000 households
- But some thought SoFIE too small (11,500) [although others pointed out that many international LHSs – such as the BHPS and HILDA – started much smaller]

6.2. Indefinite life panel

There was general support for an indefinite-life panel:

- *“8 years is far too short” - Medium term panels like SoFIE are not long enough to understand the antecedents and consequences of many life events, while controlling for enduring characteristics of individuals.*

- *“This is a no-brainer”*
- *“The decisions individuals and households make are based on a long-term accumulation of outcomes of past decisions. Having that long history enriches the analysis tremendously”.*
- *“Coupled dynamics of health, SES, discrimination, psycho-social attributes, and well-being need very long-lived surveys to be worth the expense and bother of collecting the data.”*
- *A long life panel better supports an interest in inter-generational effects.*

6.3. Target population

- Nationally representative sample of private households, with all members over the age of 15 interviewed.

6.4. Oversampling

- It was suggested that there should be oversampling of Maori, Pacific peoples, Immigrants, low-income, Asian
- Respondents noted that while oversampling could lead to less precision in estimates overall, this strategy is much cheaper than the alternative strategy of a larger sample to yield precise estimates for sub-populations of interest. Standard sampling strategies always under-represent some parts of the population such as young people with weak attachments to the labour market and family.
- An additional Innovation sample was suggested (for testing survey innovations)

6.5. Representativeness of population over time

Many respondents noted the challenge that exists for all panel surveys, of managing attrition and maintaining representativeness, and some suggested means of managing the risks.

- *“Ongoing funding is dependent on having a viable panel”*
- Use internationally well-established tools to keep response rates high and attrition low over time: tracking between waves, checks in databases, postcards, and “on-the-ground” tracking, with additional training for interviewers in these techniques. Provide panel members with feedback on the value of the information obtained from the survey. *“The importance of having a really motivated team . . . cannot be overstated”*
- There was some support for incentive payments (as in HILDA) though SoFIE maintained low attrition rates without such payments.
- Use standard following rules (for example following those born to original sample members and a parent of such a child even if not an original sample member) and periodic refresher samples to take account of migration flows. *“NZ has high rates of immigration . . . refresh every couple of years”.*
- Some suggested, contrary to international practice, that it would be possible to follow panel members into institutions (such as prisons); and overseas – especially if low cost

interviewing techniques could be used (e.g. via the internet or Skype) or, in the case of Trans-Tasman movements, through reciprocal arrangements with HILDA.

- But “*previous research suggests that non-random attrition is NOT a big deal in many research contexts*”. While attrition reduces the sample size and the precision of estimates, cross-sectional representativeness can be addressed through the use of weights.

7. Interviewing

Respondents identified a range of options and tradeoffs for administering interviews.

- Annual interviews – possibly spread over a full year (as in SoFIE) if event histories were collected that allowed construction of variables that maintained comparability across survey members interviewed at different times.
- A range of interview modes discussed, including
 - First wave as face-to-face (Computer Assisted Personal Interview)
 - Computer Assisted Telephone Interview/ Self completion (including Audio and Computer Assisted Self Interview)/ Internet. Self-completed questionnaires have the advantage of encouraging responses to sensitive topics and saving on interviewer time, but could entail additional costs if interviewers have to return to retrieve paper forms.
 - “*You have to provide the ability to conduct some interviews in the field (c. 10%) or you’ll lose sample*”
 - “*Follow best practice*”
 - Administered in multiple languages (but note that which is “*lost in translation*”)

8. Governance and management

There were two contrasting sets of responses about how a longitudinal household survey should be managed, based on whether the survey should be managed and run by Statistics New Zealand or by an independent organisation.

Some respondents (mostly central and local Government agencies) favoured leadership from Statistics New Zealand, given the large investment that would be involved and a feeling that this could only be justified and sustained by a new LHS being a key component of New Zealand’s social science infrastructure. This was tempered by the observation that successful overseas LHS’s are usually run from outside central statistical agencies, and the expectation that outputs would need to be more readily available for research and analysis than has hitherto been the case with official collections in New Zealand.

- “StatsNZ is the proper lead agency for such surveys . . . though admittedly [it] would have to substantially change the way it has worked”
- “Statistics New Zealand [should be] data custodian, plus a body representing key stakeholders for guidance”
- “*A partnership approach*” (various combinations of StatsNZ/ Govt Agencies/ NZ research groups/ international collaborators)

However, a clear majority of respondents thought a LHS should be designed and managed by an agency at arm’s length from Government. In addition, strong multi-disciplinary scientific oversight of a new LHS is needed. This could include representation on a reference group from a wide range of social sciences covering, for example: economics, political science, psychology, sociology, geography, education and also epidemiology and gerontology.

- “*Same as HILDA, run through an independent research institute*”
- “*Statistical agencies may not have an advantage in that they are mostly built to field a Census and cross-sectional surveys*”
- “*Administration . . . handled outside the government . . . to best capture a broad range of objectives and keep up with new developments*”
- “*Scientific governance is critical . . . HILDA provides a good template*”
- “*A clear programme of [research]*” . . . with “*a nominated leader and nominated principal investigators*”

Most respondents agreed that the design and management of a new HPS would benefit from input from overseas expertise in this field.

9. Funding

Many respondents identified the securing of ongoing funding as a key challenge to be met.

- “*Funding should be stable and not time limited*”
- [Given the scope and scale] “*Government funding, direct or indirect, is inevitable.*”
- “*It should be Vote: Statistics*” [to relieve pressure on funding for other social science projects]
- “*at arm’s length*”
- “*Funding would be best secured at arm’s length from a govt department, such as via social science infrastructure funding*”
- “. . . administered by an agency that is at arm’s length from government. Motu and/ or Stats NZ [sic] would be good candidates.”
- “*Something like a Science Foundation, not tied to government programs and policies, would be optimal*”

- “. . . some financial involvement from the private sector and perhaps philanthropic bodies, both here and overseas”
- Supplementary funding could be derived from a range of Government agencies and be attached to particular survey modules designed to address defined research questions.

10. Data access and user support

Almost all respondents favoured relatively easy and low cost access to data – especially as compared to current arrangements in the official statistics system in New Zealand. Most saw data access for international LHSs not administered by official agencies as the desirable model.

- *“Data accessibility would be my bottom line”*
- *“relatively unrestricted access is critical to good user take-up”*
- *“It must be more accessible than current microdata”*
- *“Rapid processing and dissemination”*
- *“SoFIE was not successful because few people could access the data – and it was prohibitively expensive – and it was poorly documented – and it was difficult to use”*
- *“The administrator . . . should produce adequate documentation including a user’s guide”*
- *“Ideally, the data would be accessible through a website and users would be able to customise and download their data tables”*
- *“If the data are not used, the benefit/cost ratio will remain low. And use is cumulative – snowballs”*
- *“it is possible to design arrangements that both allow use and address confidentiality concerns”.*
- Allowing easy access to international researchers (e.g. through participation in the Cross-National Equivalent File that harmonises data from a range of international LHSs through data deposited at Cornell University) would provide pay-offs in terms of free comparative research on New Zealand.

Respondents reflected on the NZ experience with SoFIE and the contrasting example set by international LHSs such as HILDA and noted that getting a good return on the initial investment in a survey depends on factors such as

- establishing a sound data infrastructure from the beginning, combined with
- a well thought-through strategy for making data available in a readily usable and timely form, together with user support in the form of internet based resources, training workshops, reports and conferences.
- *“The contrast between using SoFIE data and using HILDA data is remarkable – you pay a few hundred Australian dollars to get a copy of HILDA data, and comprehensive and detailed documentation, including code to help you get started. When I started using HILDA, I was running analyses the same day I put the HILDA disk into my computer. SoFIE, on the other hand, costs thousands of NZ dollars to access, which you can only use if you go into Wellington Statistics New Zealand, the documentation is limited, it takes several days to get the data into a useable form (and initially it took several months), and there have been ongoing issues with data quality.”*

11. Alternative or complementary data sources

For those who questioned the value of a new LHS, the most important issue was the potential to meet data needs from existing and developing alternative sources.

- *“more value could be derived from the longitudinal surveys ‘owned’ by NZ Statistics (sic) . . . but only accessible to a limited set of researchers”*
- *“. . . piggy-backing this on existing studies could be useful (either Growing Up [In New Zealand] or Census)”*
- Longitudinally linked administrative data could meet future data needs at relatively lower cost, but:
 - *“Existing data sources cover too narrow a range of information to be regarded as a complete replacement for longitudinal surveys.”*
 - The technical and socio-legal difficulties and limitations in linking and using administrative data should not be underestimated (as illustrated by difficulties with the UK Work and Pensions Longitudinal Study where access is limited by very stringent constraints imposed by confidentiality, privacy and data security concerns).
 - Longitudinally linked administrative data generally do not provide a household context for events; nor are variables necessarily defined in ways that are useful to researchers or consistent (such as ethnic variables), or available in a form that accurately records the timing of events. In addition, a purpose designed LHS will likely support multi-disciplinary research better than administrative data.
 - Linked census data is not frequent enough for many research purposes.

Others argued that a new LHS would be complementary to data from existing sources

- LHSs *“adds value to what we can get from birth cohort studies”*. Cohort studies (such as GUINZ , the DMHDS and CHDS) by design do not provide a representative picture of the current population – a LHS would provide a useful check on wider and current applicability of their findings.
- *“the data from HILDA would complement IDI [Statistics New Zealand Integrated Data Infrastructure]”*. One response identified a wide range of topics where an LHS could provide longitudinal data not available through administrative sources, including: aspects of housing (especially dwelling type and annual expenditures), retirement related subjective definitions and behaviour, youth transitions to work and life-long education and training (including informal education and training), experience of unemployment and underemployment as well as alternative forms of employment, detailed childcare and other caring arrangements, some domains relating to immigrants’ settlement experiences, trans-Tasman migration and comparative return to skills in Australia and New Zealand.
- An LHS would provide greater flexibility than administrative data in responding to emerging issues.

12. HILDA [Household Income and Labour Dynamics in Australia]

The issues and options paper had noted the possibility of some form of coordination with the Melbourne Institute, who manage the HILDA survey. Social, economic, cultural and political similarities between Australia and New Zealand, as well as proximity raise the possibility that a new LHS in New Zealand could piggy-back on or collaborate with HILDA.

Respondents provided a range of views on the strengths and weaknesses of such coordination or collaboration:

- *“HILDA is in all respects the most suitable model for NZ”*

In particular there would be:

- *“Savings in . . . developing the local expertise and infrastructure”*
- *“Improved cross-country [Trans-Tasman] analysis”*
- Improved ability to study the nature of and consequences of Trans-Tasman migration

But:

- *“The economies of scale . . . will be modest . . . and will lead to conflicts in priorities”*
- The design and direction should be in the control of people who know the policy issues of NZ, know its institutions, and are knowledgeable about NZ population specifics”
- *“How does that grow capacity [for applied research] in New Zealand?”*

13. Other issues

Several respondents expressed reservations about the availability in New Zealand of people with relevant skills to analyse data from a LHS:

- Research and analysis skills
 - *There is a need to “ensure a sufficiently robust cohort of well-trained researchers come through” [who can analyse the data]*
 - *“If the data are not made accessible, . . . there are no incentives for people to learn”*
- *“Manage expectations from the beginning (without scaring people off of course)”*
 - *“It would not begin to deliver its full value for another 5-10 years”*

14. Where to next?

In response to the generally positive feedback received. Motu Research will continue to coordinate support for a new longitudinal household survey in New Zealand.

Many respondents noted that the issues and options paper fell short of being a full business case for a new longitudinal household survey. This is a fair comment, and reflects that

the intention of the paper was to gauge the strength of support for the initiative, and to identify any significant concerns or objections.

Motu Research will prepare a more focused proposal/ business case that will articulate more clearly the value of a LHS – particularly in terms of the policy and research domains it would inform (and the potential to have “*dramatic effects*” on policy), and what a LHS would add to existing and developing data sources – in other words, its potential place in the national social science data infrastructure. Such a business case will also need to set out the details of preferred options for design and management, and develop reliable costings for the options.

Motu is also keen to stay in contact with others who are keen to support this initiative, or who are willing to work with us. One of the key challenges will be to identify potential funding sources and strategies, from a combination of public sector science and policy funding, and potentially from private sector contributors.

For further information, or to register your interest, please feel free to contact:

Dave Maré

Senior Fellow, Motu Research

PO Box 24390

Wellington

Email: dave.mare@motu.org.nz

15. Appendix One: Who provided Feedback?

Scott Baldwin
Manager, Research and Statistics (Acting)
Research, Information and Monitoring Directorate
Te Puni Kōkiri

Professor Tony Blakely
Department of Public Health
University of Otago, Wellington

Michelle Lloyd, Adele Bremner, Denise Brown and Anton Samoilenko
Statistics New Zealand

Drs. Kristie Carter (Research Fellow), Ken Richardson (Biostatistician), and Fiona Gunasekara
(Researcher, Health Inequalities Research Programme)
Department of Public Health
University of Otago, Wellington

Len Cook
Public Policy Consultant
Wellington

Valmai Copeland
Principal Evaluator, National Research and Evaluation Unit
Inland Revenue Department

Professor Jackie Cumming
Director, Health Services Research Centre
School of Government
Victoria University of Wellington

Professor Peter Davis
Centre of Methods and Policy Applications in the Social Sciences (COMPASS)
& Department of Sociology
University of Auckland

Jean-Pierre de Raad
Chief Executive, New Zealand Institute of Economic Research

Sylvia Dixon and David Dundon-Smith
Ministry of Business, Innovation and Employment (Labour)

Dr Jaikishan Desai
Deputy Director, Health Services Research Centre, School of Government
Victoria University of Wellington

Dr Brian Easton
Independent Scholar

Wellington

Professor David Fergusson
Director, Christchurch Health and Development Study
University of Otago, Christchurch

Dr Arthur Grimes
Senior Research Fellow, Motu Economic and Public Policy Trust
Wellington

Dr Mary Hedges
Senior Research Fellow, Centre for Longitudinal Research
University of Auckland

Dr Roger Hurnard
Independent Economist
Wellington

Dr Veronica Jacobsen
Ministry of Business, Innovation and Employment (Science and Innovation)

Professor Stephen P. Jenkins
Department of Social Policy and the Suntory and Toyota Centre for Economics and Related
Disciplines (STICERD)
London School of Economics and Political Science

Peter Johnston
Manager Strategic Analysis and Research
Strategy Policy and Planning
Department of Corrections

Dr Denise Lievore
Senior Policy Analyst, Ministry of Women's Affairs

Associate Professor Sholeh Maani
Department of Economics
University of Auckland Business School

Dr Carina Meares
Senior Social Researcher, Research, Investigations and Monitoring Unit
Auckland Council

Dr Philip Meguire
Senior Lecturer, Department of Economics
University of Canterbury

Dr Malcolm Menzies
Research Manager, Commission for Financial Literacy and Retirement Income

Gerald Minnee
Manager, Economic Research and Analysis

The Treasury

Professor Philip Morrison
School of Geography, Environment and Earth Sciences
Victoria University of Wellington

Associate Professor Gail Pacheo
Department of Economics
AUT University

Dr Mike Pergamit
Senior Fellow, Center on Labor, Human Services and Population
Urban Institute
Washington, DC

Professor Jacques Poot
Professor of Population Economics, National Institute of Demographic and Economic Analysis
University of Waikato

Professor Richie Poulton
Director, Dunedin Multidisciplinary Health and Development Unit
Dunedin School of Medicine
University of Otago

Rosemary Ryan
Research Director, Heathrose Research
Wellington

Professor Steven Stillman
Department of Economics
University of Otago

Alison Sutton
Strategic Analyst, COMET (An Auckland Council Controlled Organisation dedicated to promoting education and skills development in South Auckland)

16. Appendix Two: Feedback prompts provided to potential respondents

Options for a new longitudinal household survey in New Zealand: Feedback sought

We are seeking your feedback by 3 August on:

- the value and desirability of a new household panel survey in New Zealand;

and, if a new survey were to be instituted, on:

- core and periodically canvassed content;
- design and operational issues;
- innovation in content, design or operation;
- how data from a new survey should best be managed and made available to the policy and research community; and
- Governance, management and funding of a new survey.

Please regard the following questions and issues as prompts for your comments – rather than something that needs to be rigidly adhered to. We are interested in your views, and do not expect everyone to have views on all topics.

CONTENT

- **Subject domains:** In what areas of interest, research domains or on what policy issues do you think that a new household panel survey will be best placed to contribute to the knowledge base? In which of these have you a particular interest and why?
- **Alternative sources:** Thinking about alternative sources of data that can contribute to these areas (In particular, the existing New Zealand cohort studies, specialist longitudinal surveys, and existing and proposed longitudinally linked administrative datasets), in what way, if at all, do you think that a new household panel survey will make a significant additional contribution? Why or why not? Do you think this contribution justifies adding a new household panel survey to New Zealand's social science infrastructure, given the likely cost of a new household panel survey?

If a new household panel survey were to be instituted:

- **Core content:** What broad areas should constitute the core content of a new HPS, which is repeated in each wave and across all participating households? (Typically, the core content of the main international HPSs cover income, labour market and family dynamics).
- **Periodic content:** What other areas of content should be the subject of periodically administered modules? Examples might include household wealth, health status, current participation in education and training, literacy and numeracy, career aspirations, attitudes and subjective well-being, housing related decisions and expenditures. How often should such modules be administered?
- **New content:** What other new areas of content (for instance biometric data) should be considered?
- **Administrative links:** Should links to administrative data on panel members be pursued, and if so, which data? What do you see as the advantages and disadvantages of pursuing such links?

DESIGN ISSUES

- **Length of panel:** Should a new HPS have an indefinite life (subject to continuing viability and ongoing funding) or should it be limited to a defined period (such as the 8 years for SoFIE)?

Why? If for a defined period, should it have a revolving panel design (as in the Canadian SLID)? Thinking about your response to the previous questions, in which areas of research or policy that you have identified would data from a medium life panel not be adequate to address the envisaged research questions?

- **Target population:** What should be the target population for a new HPS? Which household members should be interviewed? Should over-sampling of sub-populations be considered, and if so, which? What are the trade-offs involved in these choices?
- **Response rates and attrition:** What measures would you recommend to maintain high response rates and low attrition rates over time? (Consider: resources put into tracking and maintaining communication with participating households, adequate interviewer training, incentive payments to panel members).
- **Representativeness:** What measures are needed to maintain panel representativeness over time? (Consider: following rules, refresher samples).
- **Mode and Frequency of interviews:** How frequently should panel members be interviewed and by what method? (Consider CAPI, CATI, self-administered questionnaires, internet surveys, other).

DATA DISSEMINATION AND USER SUPPORT

- Given the areas of research and policy that you see a new HPS contributing to, what do you consider are the best type of arrangements for data dissemination and user support? (Consider a range of options from the relatively restricted access to micro-data usually associated with official collections, to the almost completely unrestricted access to confidentialised micro-data that is available in a number of the international longitudinal surveys.)
- What services should an HPS administrator provide to potential users to ensure effective use of the data by the research community?

GOVERNANCE AND MANAGEMENT ISSUES

- Given your preferences for content and design of a new HPS, what sort of governance and management arrangements would you favour and why? (Consider: Government agency or consortium of Government agencies; non-Government agency with or without links to an internationally experienced administrator of a HPS; substantial leadership or at least involvement from an internationally experienced administrator of a HPS; possible use of sub-contractors for field-work and data administration).

FUNDING

- What sources of funding would be most appropriate for a HPS?
- What is the feasibility of securing the necessary funds?

OTHER COMMENTS

- Have you any additional comments or observations either on the accompanying paper or on a potential new HPS in New Zealand?

**Please email your feedback to Dave Maré by 3 August at
dave.mare@motu.org.nz**