



**NEXT
STEPS**
LEARNING FROM YOUR GENERATION

August 2024

Next Steps - Sweep 9 survey

Technical Report

Report for the Centre for Longitudinal Studies

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1 Introduction

1.1 Survey background and history

The longitudinal study known as Next Steps, formerly called the Longitudinal Study of Young People in England (LSYPE), tracks the lives of approximately 16,000 individuals in England who were born in the years 1989-90. The study commenced in 2004 when the cohort members were 14 years old, with an initial sample size of 15,770 individuals. The cohort members were surveyed annually until 2010. These first seven sweeps of the study were managed and funded by the Department for Education. In 2013, Next Steps was transferred to the UCL Centre for Longitudinal Studies (CLS) and since then surveys have been conducted at age 25 – Sweep 8 (in 2015-16) and most recently at age 32 – Sweep 9 (in 2022-23). The Sweep 8 and Sweep 9 surveys were funded by the Economic and Social Research Council.

The study collects information on various aspects of the cohort members' lives, including their education, employment, economic circumstances, family life, physical and emotional health, well-being, social participation, and attitudes. The Next Steps data is linked to the National Pupil Database (NPD) records, which encompass the individual scores of cohort members at Key Stage 2, 3, and 4 and there are plans to establish additional administrative linkages with organisations such as the Higher Education Statistics Agency, The Universities and Colleges Admissions Service, and the Department for Work and Pensions. NHS Hospital Episodes Statistics have also been linked.

The study has yielded significant findings, providing valuable insights into the factors that impact young people's academic performance and educational transitions. It has also shed light on the lives of young adults in their twenties. Its influence on education policy has been noteworthy, evidenced by initiatives such as raising the mandatory participation age in education and training, investing in vocational education, and developing anti-bullying guidance for schools. Research based on Next Steps data has offered valuable understanding of issues such as bullying experienced by individuals with disabilities and those classed as a sexual minority, as well as the role of subject choices and aspirations in educational paths. The study has contributed new evidence regarding the employment experiences of young adults, particularly concerning the association between shift work, zero-hours contracts, and mental health.

1.2 Aims of the study

The study was originally set up by the Department for Education to study young people's experiences of secondary school and their transitions from compulsory schooling to further education, training or the labour market.

Since becoming part of the CLS family of longitudinal studies the focus of Next Steps has broadened and the study now aims to collect information on many different aspects of life, including physical and educational development, economic circumstances, employment, family life, health behaviour, wellbeing, social participation, and attitudes.

By following study members over time, the study seeks to examine how early experiences can shape later life circumstances. By collecting information that is comparable to the other cohort studies, researchers can also examine how life changes between different generations.

The aim of the Sweep 9 Survey is to provide data for research and policy on the lives of this generation of adults in their early thirties. Since the last sweep at age 25 (Sweep 8), many of the cohort will have experienced important life transitions in relation to work and careers, education and training, partnerships, children and their housing situation. However, pathways to adulthood are varied and complex for this generation. The Sweep 9 survey also collected information on many wider aspects of cohort members' lives including health and well-being, politics and social participation, identity and attitudes.

The Sweep 9 Survey involved asking cohort members to 1) complete a survey, 2) provide consent to give the Next Steps study team access to information held in various administrative records and 3) provide a saliva sample from which DNA will be extracted for genetic research.

1.3 Introduction to the Sweep 9 survey

In 2020, CLS commissioned Ipsos to conduct the fieldwork for Next Steps Sweep 9 that were scheduled to take place in 2022 when cohort members were aged 31/32. The survey was originally planned to be conducted face-to-face but in light of the COVID pandemic it was decided that an online-first mixed mode approach would be more suitable. Web non-responders were issued to interviewers after three weeks who were able to offer a range of COVID-secure methods alongside the standard in-home interviewing approach. The Sweep 9 approach can be summarised as per figure 1 below:

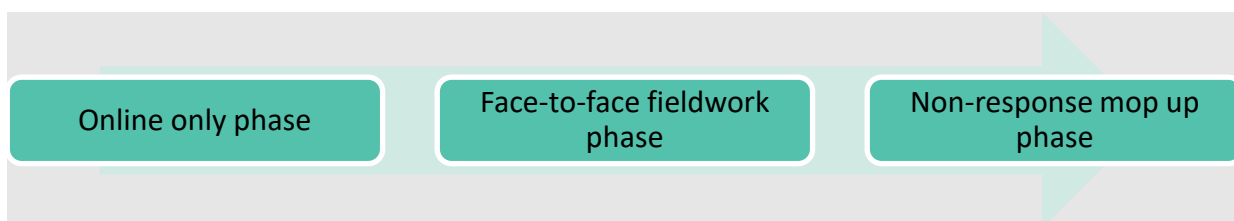


Figure 1 Next Steps Sweep 9 fieldwork approach

Respondents received an advance letter and e-mail which explained what the survey is about and invited them to participate in the online survey. Non-responding cohort members were sent reminders by e-mail, text and/or letter. The fieldwork period for the online survey lasted three weeks. After the three-week period, cohort members who had not completed the survey online were issued to face-to-face interviewers. The online survey remained opened should cohort members prefer to complete the survey online during the face-to-face fieldwork period. Respondents that had not participated by the end of the face-to-face fieldwork period were subsequently invited to complete a shortened online survey which remained open for a further three-week period (the online non-response mop-up survey).

At the end of the questionnaire, cohort members were requested to provide consent for administrative records to be linked to their survey data if they had not provided consent at sweep 8. Cohort members were also requested to provide a saliva sample for DNA testing for the first time.

This technical report provides an account of the design, development and conduct of the Sweep 9 Survey.

2 Pilot testing, development and soft launch

A pilot study took place between May and August 2021 whereafter the study materials and the questionnaire were updated based on the findings at the pilot phase. A soft launch of the study was implemented to ensure that all procedures and processes were working as anticipated.

2.1 Piloting objectives

The specific objectives for the pilot were as follows:

- Test various COVID secure modes of data collection and identifying the most appropriate modes to implement during the main stage survey.
- Assess the comprehensibility of the survey questionnaire.
- Estimate the time required for each data collection module.
- Evaluate the use of non-standard instruments such as cognitive assessments, saliva sample collection, and data linkage.
- Establish training procedures for interviewers.
- Examine the adequacy of the survey materials and the reminder strategy.

In order not to overburden existing cohort members, it was decided to recruit a 'fresh sample' similar to the current cohort. Due to the use of a freshly recruited sample, certain aspects such as response rates, tracing, contacting and gaining cooperation, field and sample management procedures, as well as fieldwork progress reports and other paradata like mover data, could not be assessed during the pilot phase.

2.2 Contact strategy and timings

Several contact attempts were made to make contact with the recruited participants to invite them to take part in the survey; these are set out in the following table.

Table 1. Contact strategy

Contact method	Date sent out / timings	Mode the contact applies to
Main survey		
Advance postal mailing	28 May 2021	All
Advance email	01 June 2021	All
Reminder email	07 June 2021	Online
Reminder text	10 June 2021	Online

Telephone calls	Dependent on respondent availability	Face-to-face and telephone
Separate online self-completion survey		
Reminder email	21 June 2021	Telephone interviews where self-completion questionnaire completed online (Methods 7 and 9 below)

2.3 Pilot approach and modes

At the time of the pilot, COVID restrictions meant in-home interviewing was not possible. It was unknown when in-home interviewing would resume therefore it was decided that various remote interviewing modes should be tested at the pilot to ascertain which to take forward. Telephone interviews were conducted in various different ways by both face-to-face and telephone interviewers.

Participants were recruited to complete the survey via a specific mode as summarised by the below table:

Table 2. Pilot modes and target sample sizes by mode

Mode	Summary	Target
1. Online	Standard online survey	40
2. Secondary device	Interviewer visits address handing over a 'secondary device' (small tablet) and survey log in details to participant The device is left with the participant to complete the survey. The interviewer then returns to collect the device at an agreed time.	25
3. MS Teams	Interview conducted using a video call. Interviewer shared their CAPI screen with participant via Microsoft Teams. Self-completion module was completed via a separate online survey during interview. Interviewer waited on the Teams call while participant completed the self-completion module.	30
4. In-home interviewing	In-home interviewing was not included at the pilot stage because of COVID restrictions.	0
5. Telephone interview with showcards (F2F interviewers)	Telephone interview with showcards for longer response lists. Showcards posted or hand delivered to participant in advance of the interview by interviewer.	25
6. Telephone interview with no showcards (F2F interviewers)	Telephone interview (by the face-to-face interviewers) with no showcards. All questions, including the self-completion module and cognitive assessment, were read out in full by interviewer.	10

7. Telephone interview with no showcards and online self-completion (F2F interviewers)	Telephone interview (by the face-to-face interviewers); interviewer read out all survey questions and answers, except the self-completion module and cognitive assessment which were completed by the participant online via a link emailed by the interviewer.	15
8. Telephone interview with no showcards (Telephone interviewers)	Telephone interview (by the telephone interviewers) with no visuals; All questions, including the self-completion module and cognitive assessment, were read out in full by interviewer.	10
9. Telephone interview with no showcards – separate online self-completion (Telephone interview)	Telephone interview (by the telephone interviewers); interviewer read out all survey questions and answers, except the self-completion module and cognitive assessment which were completed by the participant online via a link emailed the interviewer.	20
Total		175

2.4 Pilot recruitment

In the pilot phase, a group of participants aged between 27 and 35 years were recruited through the assistance of an external recruitment agency. Participants were recruited by phone using existing panels and data bases. These participants were chosen from across England. Quotas were used to ensure the inclusion of a diverse range of individuals.

These quotas were based on:

- Location type (urban / rural)
- Gender
- Social grade
- Ethnicity
- Household composition (living with a partner or not)

A recruitment letter, outlining what was involved in the study was provided to participants. Once recruited the advance mailing materials were shared with the participants. Pilot participants were offered £35 if completed online, and £60 if completed with an interviewer.

Ipsos MORI



NEXT STEPS – PILOT F2F INFORMATION SHEET

What is Next Steps?

Next Steps, previously known as the Longitudinal Study of Young People in England (LSYPE), is a study run by the Centre for Longitudinal Studies at the UCL Institute of Education. The study follows around 16,000 people in England born in 1989-90. Next Steps has provided important evidence about the factors that influence young people's performance at school and their educational transitions, and about the lives of young adults in their twenties. It has had a major impact on education policy, including raising the compulsory participation age in education and training. You can find out more about the study here: <https://nextstepsstudy.org.uk>

Why are you asking me to take part?

Next Steps study members are now in their early thirties and later this year we'll be launching our next survey. To best prepare for this, we would like to test the survey with people aged between 27 and 35. This will help us to understand what works well and what we can improve so that the main survey is as successful as possible. **You will not become part of Next Steps, we would only like you to help us test the survey.**

What would you like me to do?

We would like you to do the following:

- Complete a questionnaire in the way that has been explained to you. The questions we ask are about your family and social life, your housing circumstances, your employment and income, your education, your health and well-being. We will also ask for your and your partner's (if you have one and live together) permission to add information held about you in administrative records, maintained by various government agencies. This will take about 65-90 minutes depending on the method you are using.
- Provide feedback which will take about 10 minutes.
- After you have completed the survey, if you agree, provide a saliva sample which will take around 5 minutes

You will be sent further information by email and/or post.

Will I get anything for taking part?

As mentioned when you were recruited, you will receive a thank you for completing the questionnaire, providing feedback and returning a saliva sample. This will be provided by bank transfer once you have taken part.

What happens with the Information I provide?

Data will be used for research purposes only and in accordance with the General Data Protection Regulation (GDPR). A full Privacy Policy, setting out your rights and covering accessing, amending and deleting your data, is available at [Next Steps | FAQs \(nextstepsstudy.org.uk\)](#). Further information can be found in the booklet that will be sent to you. The information you provide will only be used to inform the design of the main survey.

Who do I contact if I have questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos MORI at uk-nextstepssurvey@ipsos.com or on Freephone 08001522516.

19-099767/F5/F2F

Figure 2 Recruitment advance letter

2.4.1 Online survey recruitment

40 participants were recruited to complete the online survey on a range of devices.

Table 3. Target quotas for recruited online participants

Device	Mobile n=20	Laptop/desktop n=15	Tablet n=5
Location	Rural – at least 4	Rural – at least 3	Rural -at least 1
Gender	Male x 10 Female x 10	Male x at least 7 Female x at least 7	Male x at least 2 Female x at least 2
Social grade	C2DE x at least 8	C2DE x at least 6	C2DE x at least 4
Ethnicity	Ethnic minority – at least 5	Ethnic minority – at least 3	Ethnic minority – at least 1
Household composition	Lives with partner – at least 5	Lives with partner – at least 3	Lives with partner – at least 1

2.4.2 Interviewer administered modes - recruitment

105 participants were recruited to take part with an interviewer across a range of locations across England and asked to complete the survey via a pre-allocated mode:

- 30 interviews via Microsoft Teams – with participants using their own device – tablet, smartphone or laptop/desktop
- 25 interviews conducted via telephone using a set of ‘single use’ showcards sent through the post or hand delivered by the interviewer
- 10 interviews completed on the telephone without showcards
- 15 interviews completed mainly on the telephone with some of the survey elements self-completed on their own device after the main interview via a web survey
- 25 using a ‘secondary device’ – a small tablet dropped off at the participant’s house with the survey pre-loaded on the device

Participants were recruited based on the quotas shown in the below table.

Table 4. Target quotas for recruited participants taking part with an interviewer

Mode	MS Teams interviewing n=30	Secondary device n=25	Telephone interview with no showcards n=10	Telephone interview (no showcards and online self-completion) n=15
Location	Rural x 5 cases	Rural x 1 area	Rural x 3 cases	Rural x 4 cases
Gender	Male x 15 Female x 15	Male x 12/13 Female x 12	Male x 5 Female x 5	Male x 7/8 Female x 7/8
Social grade	C2DE x 13	C2DE x 10	C2DE x 5	C2DE x 6
Ethnicity	Ethnic minority x 7	Ethnic minority x 5	Ethnic minority x 2	Ethnic minority x 3
Household composition	Lives with partner x 7	Lives with partner x 5	Lives with partner x 2	Lives with partner x 3

2.4.3 Telephone interviewer quotas

30 participants were recruited and invited to take part by telephone with telephone interviewers (20 of which offered online for self-completion). Of the 30 recruited participants only 26 participated. Quotas were set as shown in the table below:

Table 5. Target quotas for recruited participants taking part with a telephone interviewer

Mode	Telephone interview with no showcards n=10	Telephone interview with no showcards and online self-completion n=20
Location	Rural x 2	Rural x 5
Gender	Male x 5 Female x 5	Male x 10 Female x 10
Social grade	C2DE x 4	C2DE x 9
Ethnicity	Ethnic minority x 2	Ethnic minority x 5

2.5 Pilot phase achieved interviews

Out of the 171 participants recruited, 161 completed the survey in full whilst 3 only partially completed the survey. Seven (7) of the recruited participants refused to participate. The table below shows the number of completions by mode.

Table 6. Number of completions by mode

Method	Target / Recruited	Full Main – survey	Full - separate self-completion	Partial -main survey	Partial- separate self-completion
1 Online	40	36	n/a	2	n/a
2 Secondary devices	25	25	n/a	0	n/a
3 MS Teams	30	27	22	0	1
5 Telephone interview with showcards (F2F interviewer)	25	24	n/a	0	n/a
6 Telephone interview with no showcards (F2F interviewer)	10	8	n/a	1	n/a
7 Telephone interview with no showcards and online self-completion (F2F interviewer)	15	15	15	0	n/a
8 Telephone interview with no showcards. (Telephone interviewer)	10	10	n/a	0	n/a
9 Telephone interview with no showcards and online self-completion. (Telephone interviewer)	20	16	15	n/a	1
Total	175	161	52	3	2

2.6 Findings from the pilot phase

2.6.1 Collecting feedback

The online sample was subdivided into two groups. Twenty participants were asked to complete the online questionnaire and a member of the research team would contact them shortly after to carry out a short follow-up interview lasting 15 minutes by telephone/MS Teams. Respondents provided detailed feedback on the survey questions. The remaining participants were asked to self-complete feedback questions at the end of their interview.

Participants that completed their survey with interviewers were asked several feedback questions at the end of the survey. Some of these interviews were observed and listened to by researchers at CLS or Ipsos to gain a better insight into how well the survey worked.

In addition, all interviewers were asked to complete their own feedback form at the end of fieldwork and an interviewer de-brief was held to hear first-hand their experiences of conducting the survey.

2.6.2 Participant materials

Following recruitment, participants were posted an advance mailing that included an advance letter, a leaflet containing information about the study, a data linkage leaflet, and a booklet about saliva collection. The purpose of the advance mailing was to provide participants with more information about Next Steps, the pilot study, the content of the survey, and provide details for who to contact for further information. The data linkage leaflet contained detailed information about the purpose and process of linking data and each data source for which consent will be sought. Participants also received the advance mailing by email.

The feedback received from participants regarding the advance materials was overwhelmingly positive. Many participants expressed that they found the materials to be highly informative. The majority of respondents stated that the materials contained an appropriate amount of information.

Additionally, participants found the materials to be easily comprehensible, useful, and comprehensive. The attractive and eye-catching colourful design of the materials was also well-received, as it was considered to be well-organised.

Despite the overall satisfaction with the materials and information provided, a few suggestions for improvement were raised. Some participants recommended consolidating all the information into a single booklet or making it more concise and shorter.

According to the feedback received from interviewers, the extent to which participants thoroughly read the provided information varied, with some individuals reading it in its entirety while others only skimmed through it. Overall, interviewers reported that participants generally found the content to be adequate, with very few suggested changes.

Some interviewers encouraged participants to read the materials prior to the interview to ensure a better understanding and familiarity. In regard to the data linkage section, interviewers noted that participants who

had already read the data linkage booklet did not have any questions during this portion of the survey. This is because the survey section repeated much of the information already included in the booklet, leading to a sense of redundancy for participants. However, interviewers who confirmed that their participants had read the booklet were able to expedite the data linkage section by not reading it out loud.

2.6.3 Questionnaire length

Overall pilot questionnaire length by method

The table below provides an overview of the total time taken to complete the pilot survey by method, however, the overall length of time spent answering questions is best represented by summing the average length of the individual modules.

Table 7. Total time to complete the survey by method (in minutes)

Method	Pilot target	Number Completed	Min	Max	Median	Mean
All methods		156	28.5	221.3	88.8	89.0
1. Online	80	34	28.5	221.3	56.6	66.5
2. Secondary device	80	24	35.6	201.7	56.7	64.9
Online script		58	28.5	221.3	56.6	65.8
3. MS Teams	100	25	57.5	151.1	96.2	94.4
5 Telephone interview with showcards (F2F interviewer)	100	24	75.6	150.6	98.0	101.5
6 Telephone interview with no showcards (F2F interviewer)	100	8	84.2	120.1	105.3	102.8
7 Telephone interview with no showcards and online self-completion (F2F interviewer)	90	15	66.0	209.5	90.2	98.7
CAPI script		72	57.5	209.5	96.4	98.6
8 Telephone interview with no showcards. (Telephone interviewer)	100	10	89.5	154.4	113.4	119.9

9 Telephone interview with no showcards and online self-completion (Telephone interviewer)	90	16	85.2	156.0	109.5	110.1
CATI script		26	85.2	156.0	111.3	113.8

* Please note timings exclude multi-session completion

Questionnaire length by module – all methods

The following table provides the total time taken for pilot participants to complete each module of the survey. The target length for face-to-face was 80 minutes and for online 60 minutes.

Table 8. Total time by module for all methods (in minutes)

Module	Number Completed	Min	Max	Median	Mean
Household	53	1.5	23.6	7.4	8.1
Housing	59	1.7	13.8	5.5	5.8
Activities	57	1.1	28.0	15.0	14.4
Finance	57	2.8	18.0	8.8	9.0
Education	60	0.6	8.5	1.9	2.2
Health	60	1.3	13.0	4.4	5.0
Identity	57	2.6	14.2	7.8	7.6
Self-completion	57	8.3	55.1	18.0	20.9
Data Linkage	60	0.7	26.0	4.8	6.5
Saliva	59	0.2	4.1	1.0	1.2
Admin module	60	0.3	11.9	4.2	4.4
TOTAL (sum of the above)		21.1	216.2	78.8	85.1

Questionnaire content

Participants and interviewers reported that the design and routing proceeded effortlessly, and that the questionnaire content was interesting and engaging. Some interviewers did mention that some of the questionnaire sections took longer than expected to complete – typically when participants' histories (e.g. employment, relationship and household roster) had to be recalled.

Participants were given the opportunity to rate questions in terms of the difficulty of understanding. The feedback questions at the end of the survey asked participants which questions, if any, they found sensitive, intrusive or too personal. Although most participants said no questions were too sensitive, questions within the

self-completion section were the most frequently mentioned as the questions that some found too personal, especially questions about sex and pregnancy.

Interviewers reported that although some participants said that the questions were sensitive, they still answered them. Some participants indicated that they were not expecting the questions to be this personal and were surprised when they came up, especially participants who have experienced a trauma related to the question topic. Saliva collection was also piloted to test procedures and get an understanding of consent, although no DNA extraction would be done. All the feedback from the pilot interviews were consolidated in the pilot report and shared with CLS whereafter questionnaire changes were implemented to address the concerns raised during the pilot phase.

2.7 Data linkage and saliva consent rates

Consent rates were notably higher for interviewer-led methods in comparison to Method 1 (online survey). Despite the secondary device being similar to the online survey, where no interviewer was present, it appears to have yielded higher consent rates than the online method. However, due to the limited sample size, definitive conclusions could not be drawn from the data.

Table 9. Data linkage and saliva sample consent rates

Method	Base	Health	Edu- cation	UCAS	SLC	HMRC	DWP	MOJ	Saliva
	n	%	%	%	%	%	%	%	%
1. Online	36	58	64	64	67	50	47	61	69
2. Secondary device	25	72	84	80	76	64	64	68	84
3. MS Teams	27	70	74	74	67	52	59	67	81
5 Telephone interview with showcards (F2F interviewer)	24	71	88	88	79	58	67	79	88
6 Telephone interview with no showcards (F2F interviewer)	8	88	100	100	100	75	88	88	75
7 Telephone interview with no showcards and online self-completion (F2F interviewer)	15	73	93	93	80	60	67	87	80
8 Telephone interview with no showcards (Telephone interviewer)	10	80	90	90	90	80	80	90	100

9 Telephone interview with no showcards and online self-completion (Telephone interviewer)	16	88	94	94	94	81	88	88	81
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2.8 Sweep 9 soft launch

After the implementation of some of the changes recommended at the pilot phase, a randomly selected quarter of the Sweep 9 sample was issued to a 'soft launch'. The soft launch provided a final opportunity to ensure that all of the study elements and processes were adequately operating before the launch of the main stage study including the study elements and processes that could not be tested during the pilot phase due to the nature of the sample (i.e. the pilot did not include cohort members). During the soft launch various strategies were confirmed including outcome codes, fieldwork reporting and the contacting strategy. By conducting a soft launch, the team could gauge the acceptance and response of a sample of cohort members, ensuring that any potential problems were identified and addressed before a full-scale launch.

After the completion of the soft launch data collection the following changes were implemented:

Reduction in tracing steps

- The number of minimum home visits were reduced from six to five.
 - During the soft launch it was established that the number of cases requiring tracing were much higher than anticipated with 64% of the issued cases requiring tracing. Through tracing efforts, the fieldwork team only managed to find new addresses for 14% of tracing cases. Of these cases, only 3% were successfully traced. Of those cases that could not be traced, 70% were unproductive at the last sweep.
- Neighbour visits were made optional
 - Interviewers noted that neighbour visits did not often result in the successful tracing of a cohort member whilst increasing interviewer strain. Some neighbours were able to provide an estimation of when the cohort member moved, but very few neighbours were able to provide a new address. In a very small number of cases, neighbours were willing to share the tracing letter with the cohort member.

Partner data linkage

- This module was removed from the questionnaire
 - During the soft launch cohort member's resident partners were asked to provide permission for information from administrative records to be linked with Next Steps data. They were asked to provide this permission by completing an online survey (or with the help an interviewer should the partner be at home and available following the in-person interview of the cohort member).
 - Due to low consent and participation rate it was decided not to include partner data linkage at the subsequent waves.

Saliva incentives and materials

- Saliva materials' wording was updated based on the concerns raised by cohort members who did not consent during the soft launch.
 - The materials clarified the reasons for the collection of saliva as well as reassuring cohort members that their samples will be securely stored and only used for research purposes.
- The saliva incentive was increased from £5 to £10 per received sample.
 - Based on the low consent and return rate of samples, it was decided to increase the incentive amount to establish whether a higher incentive amount will encourage more cohort members to post their saliva samples back to the lab.

Cognitive assessment

- New question added for fieldworkers to record a response should they experience any technical difficulties.
 - During fieldwork some interviewers reported that the cognitive assessment software did not function as expected. Additional prompts were included in the script for interviewers to indicate problems experienced in order for head office to assist.

Incentive strategy

- A flat rate incentive approach was adapted, set at £30 for those who completed during the three week online period and £20 for those who completed during the face-to-face fieldwork period or the final mop-up. Please refer to the experiment section of this report for more information on the incentive strategies evaluated in the soft launch phase (Chapter 4).

Questionnaire changes

- Minor questionnaire changes to improve the flow, as well as naming conventions (for example updated Her Majesty to HM).

The next chapter of the technical report will provide an overview of the sampling approach taken for selecting cohort members to participate in the Next Steps Sweep 9 study.

3 Sampling

3.1 Overview

The study population originally comprised of young individuals who were in Year 9 in 2004, attending both state and independent schools in England. Cohort members were born between 1 September 1989 and 31 August 1990, which means that they were either 13 or 14 years old at the time of the first point of data collection. The sample design focussed on schools as the primary sample unit, with deprived schools being oversampled by 50%. Out of the 892 schools selected, 647 consented to participate (72%). Within selected schools, pupils from minority ethnic groups (Indian; Pakistani; Bangladeshi; Black African; Black Caribbean; and Mixed) were oversampled to provide sufficient base sizes for analysis. The school and pupil selection approach ensured that, within a deprivation band and ethnic group, pupils had an equal probability of selection.

In addition to the young person, a 'main' and a second parent were identified for interview in each Sweep up to and including Sweep 4 (Age 17). As of Sweep 5 (Age 18) only the young person was interviewed as per figure 2.1.

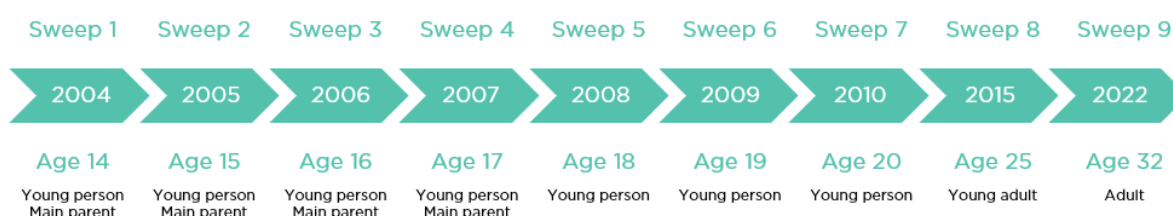


Figure 3 Summary of Next Steps Sweeps over time

The initial issued sample for Sweep 1 of the study consisted of approximately 21,000 young people. In that Sweep, a total of 15,770 households were interviewed, representing a response rate of 74%. Both young people and their parents were interviewed. In Sweep 4, an ethnic minority boost was conducted in which an additional 352 cohort members were interviewed and became study members. The ethnic boost aimed to enhance the diversity and representativeness of the study population, specifically by capturing a broader range of ethnic backgrounds including Black African and Black Caribbean young people. From Sweep 2 to Sweep 7, only those who had participated in the previous Sweep were included in each subsequent wave. Despite high response rates ranging from 86% to 92% at each individual wave, this led to a gradual reduction in the overall sample size. The sample size for the study decreased to 8,682 by Sweep 7 in 2010.

Following the transfer of the study from the Department for Education (DfE) to the Centre for Longitudinal Studies (CLS), all cohort members except for a small number who had previously withdrawn were asked for updated information and given the opportunity to opt out. A small number of cohort members opted out at this point. In total, 15,629 cases were transferred from DfE to CLS.

Table 2.1 below provides a detailed breakdown of the issued sample per wave. At Sweep 8 (Age 25/26), n=15,531 cases were issued with a response rate of 51% at the end of fieldwork.

Table 10. Previous participation rates

Year	2004 (S1)	2005 (S2)	2006 (S3)	2007 (S4) *	2008 (S5)	2009 (S6)	2010 (S7)	2015 (S8)
Age	13/14	14/15	15/16	16/17	17/18	18/19	19/20	25/26
Issued sample (n)	21,000	15,678	13,525	13,068	11,793	11,225	9,791	15,531
Achieved sample (n)	15,770	13,539	12,439	11,801	10,430	9,799	8,682	7,707
Response rate (%)	74%	86%	92%	90%	89%	87%	90%	51%

* Includes the ethnic minority boost described above (600 cases issued/352 achieved).

3.2 Sample design Sweep 9

The target sample for the Sweep 9 survey was all cohort members who have ever participated in Next Steps with the following exceptions:

- 1) Those who previously indicated that they do not wish to be contacted
- 2) Those who are known to have died
- 3) Those who are permanently untraced
- 4) Those in prison or on probation

All cases with contact information who had not opted out at previous waves were included in the study sample (15,038 cases). After applying the exclusion criteria cited above a total of 13,090 (87%) cases were issued with a further 769 cases (5%, increasing the total issue sample size to 13,859) issued at a later stage to be invited to take part online only following additional tracing work via NHS digital.

The issued sample also included cohort members known to be living outside of England. These cases were also only invited to participate online as interviewers did not travel outside of England. The table below shows further details.

Table 11. Number of cohort members living outside of England

Wave	Number of cohort members known to be living outside of England in Sweep 8	% of cohort members known to be living outside of England in Sweep 8
Soft launch	0	0%
Wave 1	193	5%
Wave 2	0	0%
Wave 3	0	0%
Total	193	1%

**Please note that these numbers indicate emigration status prior to the start of survey*

3.2.1 Sample allocation to waves

A total of n=13,090 cases were issued for fieldwork at the start of the survey. The cases were distributed between a soft launch and Waves 1 to 3. The below table provides an overview of the original sample distribution across the various waves.

Table 12. Original sample allocation per wave

Wave	Sample allocated per wave	% of issued cases n=13,090
Soft launch	3,206	25%
Wave 1	3,740	29%
Wave 2	3,979	30%
Wave 3	2,165	16%
Total	13,090	100%

A stratified random selection process (using gender, region and sweep of last participation) was used to select a representative sub-sample to be issued to the soft launch. Remaining cases were allocated to three further waves.

Study members were flagged as 'priority' cases if they i) were known to no longer live at the issued address or known to be living outside of England, ii) had not taken part in Sweep 8 or the series of COVID surveys which were conducted between 2020 and 2021, iii) had refused to take part in Sweep 8 (even if they did take part in the COVID surveys), or iv) had not confirmed their contact details since Sweep 8.

Priority cases would be harder to contact and persuade to take part and so were disproportionately allocated to earlier waves so as to ensure sufficient time for tracing.

Table 13. Priority cases in each wave

Wave	Number of priority cases	% of priority cases
Soft launch	1,893	63%
Wave 1	2,614	74%
Wave 2	2,226	60%
Wave 3	928	46%
Total	7,661	59%

During fieldwork a number of cases were moved between waves as to accommodate address changes and allow better coverage. These adjustments between waves were as follows:

Table 14. Wave switching

Switch from wave	Switch to wave	Number of cases
Soft launch	Wave 1	70
Wave 1	Wave 2	164
Wave 2	Wave 1	7
Wave 3	Wave 1	1
Wave 3	Wave 2	3
Soft launch (NHS cases)	Wave 1 then Wave 2	7
Wave 1	Wave 3	45
Wave 2	Wave 3	56

Wave switching happened continuously throughout fieldwork to accommodate address updates and the needs of the fieldwork team. At the end of fieldwork almost of a quarter of cases (24%) were allocated to the soft launch, whilst 28% of cases were allocated to Wave 1. A slightly higher number of cases were allocated to Wave 2 (31%) with a longer fieldwork period allocated to this wave. Wave 3 targeted the final 17% of the sample. Cases were clustered to minimise the distance any interviewer had to travel between cases in the cluster.

An additional 769 cohort members were issued at a later point. New addresses were obtained for these individuals during a tracing exercise conducted via NHS Digital. These cases were only invited to take part online. They were treated as a separate data collection wave, Wave 4, but were issued to online fieldwork at the same time as Wave 3.

Table 15. Revised sample allocation per wave

Wave	Sample allocated per wave	% of issued cases excl. Wave 4 n=13,090	% of issued cases incl. Wave 4 n=13,859
Soft launch	3,113	24%	22%
Wave 1	3,620	28%	26%
Wave 2	4,091	31%	30%
Wave 3	2,266	17%	16%
Wave 4	769	n/a	6%
Total	13,859	100%	100%

3.2.2 Availability of contact details

The table below shows the availability of contact details. Overall 62% of the sample had an e-mail address as well as a mobile contact number. Conversely, 18% of the sample had neither an e-mail address nor a mobile contact number. Eleven percent (11%) of the sample solely had a mobile contact number and 8% of the sample solely had an e-mail address.

Table 16. Availability of contact details

Wave	Soft launch		Wave 1		Wave 2		Wave 3		Total	
	n	%	n	%	n	%	n	%	n	%
E-mail only	242	8	296	8	356	9	193	8	1,087	8
Mobile only	339	11	498	14	419	10	197	8	1,453	11
E-mail & mobile	1,950	62	2,095	58	2,588	63	1,537	68	8,170	62
Neither	582	19	731	20	728	18	339	15	2,380	18
Total	3,113	100	3,620	100	4,091	100	2,266	100	13,090	100

* Please note that only postal addresses were available for Wave 4 respondents.

3.2.3 Availability of stable contact details

Ipsos found that the availability of stable contact details had a beneficial impact on the successful tracing of cohort members. The table below provides an overview of the number of cases where an address or a phone number or an e-mail address for a stable contact were available. Over half (52%) of the soft launch cases had stable contact details compared to 51% of Wave 1 cases, 54% of Wave 2 cases and 59% of Wave 3 cases.

Table 17. Availability of stable contact details

Wave	Stable contact available	
Soft launch	1,621	52%
Wave 1	1,832	51%
Wave 2	2,218	54%
Wave 3	1,340	59%
Total	7,011	54%

3.2.4 Last Sweep participated

As per the below table, the majority of the issued sample (58%) participated in the previous sweep (Sweep 8) of fieldwork conducted in 2015 at age 25. Additionally, 19% of the sample last participated in Sweep 7 and 26% last participated between the first and the sixth sweeps of data collection.

Table 18. Last sweep participated in

Wave	Soft launch		Wave 1		Wave 2		Wave 3		Wave 4		Total	
	n	%	N	%	n	%	n	%	n	%	n	%
Sweep 8	1,844	59	1,945	54	2,385	58	1,450	64	0	0	7,624	55
Sweep 7	610	20	824	23	790	19	386	17	0	0	2,610	19
Sweep 6	93	3	143	4	164	4	65	3	65	8	530	4
Sweep 5	101	3	125	3	136	4	80	3	70	9	512	4
Sweep 4	98	3	110	3	136	4	64	3	115	15	523	4
Sweep 3	85	3	102	3	117	3	51	2	109	14	464	3
Sweep 2	99	3	100	3	107	2	59	3	163	21	528	4
Sweep 1	183	6	271	7	256	6	111	5	247	32	1,068	8
Total	3,113	100	3,620	100	4,091	100	2,266	100	769	100	13,859	100

3.3 Sample management and updates

3.3.1 Circulation of new contact information

The CLS Cohort Maintenance Team (CMT) sent weekly update files to Ipsos throughout fieldwork which included information about new contact details obtained or changes in status (e.g. refusals). This information was updated in Ipsos' fieldwork management system and subsequently provided to interviewers via their local Electronic Contact Sheets (ECS). Urgent information such as appointment cancellations was provided to Ipsos on a daily basis.

3.3.2 In-field sample management

Interviewers recorded all contact and tracing attempts as well as contact details updates in their ECS, allowing Ipsos to closely monitor progress.

3.3.3 Cohort member tracing and movers

The majority of sample information updates were noted during fieldwork as a result of tracing by interviewers and cohort members providing updated contact information in the admin section of the questionnaire itself at

the end of the interview. In addition, sample updates were received via the Ipsos Respondent Communication call centre whose Freephone number was included on the advance materials sent to cohort members.

Details from untraced movers were sent through to CLS for office-based tracing with updates sent back to Ipsos. Where new contact information was obtained, cases would be reallocated to the fieldwork team to be contacted.

A detailed description on the fieldwork tracing protocol can be found in chapter 6 of the technical report, whilst figures on untraced movers or traced movers not attempted are shared in chapter 8 of this report.

3.3.4 Office tracing at CLS

The CLS Cohort Maintenance Team (CMT) were actively tracing and updating cohort information throughout fieldwork. CLS tracing is carried out by phone, post, email, texting, internet searches, social media and using publicly available phone and electoral register records. CLS also obtain address updates from NHS Digital and use commercial contact details validation services to seek new information. New information obtained by CLS was shared weekly with Ipsos so that cohort members could be recontacted.

4 Methodological assessments

Researchers run methodological experiments on longitudinal surveys to improve the accuracy and reliability of the data collected. By conducting these experiments, researchers can test different survey designs, sampling techniques, and data collection methods to determine which approaches yield the most valid and reliable results.

4.1 Incentive experiment

Based on the existing body of survey literature, the study team formulated a hypothesis that, in order to optimise overall response rates while adhering to a fixed incentive budget, it might be more effective to provide varying incentive amounts based on the anticipated response propensities of individual sample members, rather than offering a uniform incentive to all cohort members.

Specifically, the study team hypothesised that a lower incentive provided to those who took part in the most recent survey sweep (Sweep 8) would have a minimal effect on cooperation rates. Conversely, offering a higher incentive to cohort members who were less motivated and did not participate in Sweep 8 could potentially have a more significant impact. The ultimate goal was to mitigate non-response bias across various survey variables by increasing the participation of Sweep 8 non-responders.

The experimental design was complex due to the implementation of different incentive amounts for cohort members who completed the online survey within the first three weeks of fieldwork (early incentive), compared to those who participated after this time period (late incentive). As a result, the control group received two levels of incentives, and the experimental group received four levels of incentives. The table below provides an overview of the distribution of incentive amounts for the early and late incentive conditions. This 'early bird' incentive approach was implemented on the basis of experimentation conducted at the Sweep 8 survey.

The experiment compared two conditional incentive regimes which were implemented across the soft launch sample:

- **Control group:** Offering the same amount to all cohort members regardless of sweep 8 participation; and
- **Experimental group:** Relative to the control, offering a larger amount to those who did not participate in sweep 8, and a smaller amount to those who took part at sweep 8.

The soft launch experiment was structured as per the table below:

Table 19. Incentive experiment allocation

Group allocation	Sample size	Incentive amounts	
	n	Early (£)	Late (£)
Control	1,603	30	20
Total experiment group	1,603		
• Sweep 8 Respondents	938	25	15
• Sweep 8 non- respondents	665	35	25
Total	3,206		

In order to control the impact of random variability on observed differences between experimental and control groups, stratification was applied during group allocation. Stratification variables were chosen for likely impact on the key dependent variable for the experiment, namely cooperation and refusal rates. Analysis of Age 25 (Sweep 8) response data indicated that in the most recent previous Sweep of participation, region and gender all correlated with cooperation/refusal in Sweep 8, and as a result, these variables were used as strata during allocation to experimental and control groups. The following stratification scheme was used:

- First level of stratification: participation history (Strata: last participated in Sweep 8 | last participated in Sweep 7 | last participated in Sweeps 1-6)
- Second level of stratification: region (Strata: South | London | North | Midlands)
- Third level of stratification: gender (Strata: Male | Female)

Based on the stratification, the sample distribution was updated as follows:

Table 20. Incentive amount distribution

Incentive amounts as early/late	Count	Percentage
£25/£15	921	30%
£30/£20	1,557	50%
£35/£25	635	20%

Incentives were provided by Blackhawk in the form of a voucher, which could be emailed or posted to cohort members depending on their preference. Cohort members could redeem their vouchers with a variety of different retail providers either online or in-store, or donate the value of their vouchers to charity.

The table below indicates the overall response rate, counting useable partial interviews as positive responses. Overall response rates did not differ significantly by experimental condition (Control: 51%; Experimental 50%). Response rate did not differ significantly between conditions by Sweep of last previous response (24% versus 25% for those who last responded in Sweeps 1 to 7; 70% versus 68% for those last responding in Sweep 8).

Furthermore, experimental condition did not affect mode of response: 88% of responses were online in both conditions.

Table 21. Response rate by Sweep of last response within experimental group

Sweep of last response	Status	Control group	Experimental group	Total
Sweep 1-7	Productive	24%	25%	25%
	Unproductive	76%	75%	75%
	Base	665	665	1,330
Sweep 8	Productive	70%	68%	69%

	Unproductive	30%	32%	31%
	Base	938	938	1876
Whole sample	Productive	51%	50%	50%
	Unproductive	49%	50%	50%
Total number of cases		1,603	1,603	3,206

Based on these findings it was decided that incentives would not be varied between prior sweep respondents and non-respondents for the main stage survey. The early incentive value (allocated to cohort members that completed the online survey during the first 3 weeks of fieldwork) was set at £30 and the late incentive value (allocated to cohort members that completed the survey after the 3 week online fieldwork period was complete) was set at £20.

4.2 Varied mop up (non-response follow-up) questionnaire length

Non-respondents were re-invited to participate online, three months after the end of the face-to-face fieldwork period. This final attempt of contacting all non-respondents to boost response is referred to as the mop up phase. The soft launch wave of the survey had a distinct mop up phase that was separate from the Waves 1-4 mop up phase. The purpose of this soft launch mop up phase was to assess and evaluate the optimal length of the online questionnaire in order to maximise the response rate during the subsequent main mop up phase. By conducting this test, researchers aimed to gather valuable insights into the relationship between questionnaire length and response rates, ultimately enhancing the overall effectiveness and efficiency of the mop up survey.

It was estimated that cohort members took 60-minutes to complete the online survey, including the special elements such as the cognitive assessment and saliva collection. For the purpose of the mop up experiment it was decided to make the following amendments:

Table 22. Element included in control and experiment group

Study element	Included in control group	Included in experimental group
Online questionnaire length	60-minutes	20-minutes
Special element: Data linkage	Yes	No
Special element: Cognitive assessment	Yes	No
Special element: Saliva collection	Yes	No

Ipsos in collaboration with CLS identified variables that could be excluded from the questionnaire for the experimental group. Advance materials for this group were updated in accordance. After determining eligibility to participate in the mop up phase, eligible cohort members were randomly selected to be part of the control versus the experimental group. Cohort members that partially completed the questionnaire (useable partials,

i.e. who completed the household module but did not finish the survey) were excluded from randomization and were allocated to the experimental group.

A total of n=1,337 soft launch cases were issued to the mop up. The overall mop up response rate including both the 60-minute and 30-minute questionnaire was 13% (n=168). The response rate amongst the experimental group that were invited to the 20-minute questionnaire was 14% which was significantly higher than the 11% achieved amongst those offered the 60-minute questionnaire. The table below provides a breakdown of cohort members that opened the survey link by their level of questionnaire completion. Cohort members that partially completed the questionnaire completed the household composition module but did not complete the remainder of the questionnaire. In addition, one cohort member refused to provide consent at the beginning of the survey whereafter the survey was terminated. It is worth noting that the soft launch mop up remained open to respondents for the duration of the study period, and that the figures in the below table refer to all completions during this time.

Table 23. Survey outcomes in control and experiment group

Survey outcome	Control group		Experimental group		Total	
	60-minute		20-minute			
Total issued	671	100%	666	100%	1,337	100%
Completes	59	9%	89	13%	148	11%
Partial completes	14	2%	6	1%	20	1%
Total response (and response rate*)	73	11%	95	14%	168	13%
Started survey but didn't finish	9	1%	17	3%	26	2%
Refused at consent question	1	0%	0	0%	1	0%
Did not take part	588	88%	554	83%	1,142	85%
Total non-response	598	89%	571	86%	1,169	87%

**Response rate consists of fully completed interviews as well as partially completed interviews.*

Based on the findings from the soft launch mop up experiment, it was decided to continue using the shortened questionnaire for the main survey mop up.

The subsequent section of this technical report will delve into the development and implementation phases of the questionnaire.

5 Questionnaire design and implementation

The questionnaire was prepared and shared by CLS. Ipsos provided input into the questionnaire and the final version of the questionnaire was signed off by CLS before scripting commenced.

5.1 Questionnaire development

The questionnaire went through multiple iterations and refinements ensuring a thorough and comprehensive review before being approved by CLS.

The Sweep 9 survey questionnaire can be accessed here:

<https://cls.ucl.ac.uk/wp-content/uploads/2023/07/Next-Steps-Age-32-Survey-Questionnaire-2.pdf>

The questionnaires used in previous sweeps can be found here:

<https://beta.ukdataservice.ac.uk/datacatalogue/studies/study?id=5545&type=Data%20catalogue<#!/documentation>

5.2 Questionnaire content overview

The questionnaire was prepared by CLS. The table below summarises the content of the full questionnaire and indicates whether each set of questions was included in the 20 minute mop-up version:

Table 24. Questionnaire content overview

Module 1		
Title	Full questionnaire content	Included in 20 minute mop-up
Household relationship	Introductions	Yes
	Confirmation of cohort member details: <ul style="list-style-type: none"> Name, DOB and contact information (address, telephone number(s), email) 	Yes
	Partner grid: <ul style="list-style-type: none"> Confirmation of partner details at last sweep (if interviewed in the last sweep): name, sex, gender, DOB and relationship to CM Co-habiting relationships – since previous interview (if taken part after September 2006) or since September 2006 (if not taken part after September 2006) – includes start and end dates of living together, name of partner, sex and gender, and DOB/age Current marital status – including dates of marriages/divorces/deaths (Current) non-cohabiting partner: name, sex, gender, DOB, start date of relationship, previous cohabitation and end date of living together 	Yes
	Child grid: <ul style="list-style-type: none"> Confirmation of children recorded at last sweep: name, DOB, sex, gender (if 11 or more years), relationship to cohort member Details of any other (new) children CM considers to be a parent of: name, DOB, sex, gender (if 11 or more years), relationship to cohort member Whether child is current partner's biological child Whether child is currently living, has always lived since birth, or ever lived with CM When child last lived with CM (age or DOB) Date child started living with CM (if not living with them at last interview) Date of child's death (if applicable) Non-resident children: who child lives with, frequency of in-person contacts, 	Yes

	<p>frequency of overnight stays, child's maintenance</p> <ul style="list-style-type: none"> • Non-resident parents: frequency of in-person contacts with child, frequency of overnight stays, child's maintenance • Childcare: Childcare used for children under 16 	
	<p>Other household members:</p> <ul style="list-style-type: none"> • Confirmation of details from last sweep: name, DOB/age, sex, gender (if 11 or more years), relationship to cohort member (if still living with this person); end dates of living together (if no longer living with this person) • Details of any other (new) household members not recorded: name, DOB/age, sex, gender (if 11 or more years), relationship to cohort member, start dates of living with this person 	Yes
Module 2		
Title	Full questionnaire content	Included in 20 minute mop-up
Housing	<p>Current housing:</p> <ul style="list-style-type: none"> • Whether living at same address as last sweep (if interviewed in the last sweep) • Dates of moving at current address • Type of accommodation – tenure, ownership details, tenancy • Room number • Property purchase price, source of funding, dates of purchase • Whether current property is first owned or whether ever owned (or shared ownership of) a property, age first owned a property • Rent payments, rent deductions • Outstanding mortgage payments • Satisfaction with accommodation • Ownership of other property, value of property/outstanding mortgage payments 	<p>Yes, but only included:</p> <ul style="list-style-type: none"> • Whether living at same address as last sweep (if interviewed in the last sweep) • Dates of moving at current address • Type of accommodation – tenure, ownership details, tenancy
	<p>Previous housing:</p> <ul style="list-style-type: none"> • Age first moved out of parents' home • Number of addresses lived at outside of parents' home 	No
	<p>Homelessness after 16:</p> <ul style="list-style-type: none"> • Whether have ever or number of times have been homeless after age 16 • Age when (first) became homeless • (Total) Period of homelessness • Whether homeless on their own or with family (last period) • Reason(s) to become homeless (last period) • • Where stayed while homeless (last period) 	No

Module 3		
Title	Full questionnaire content	Included in 20 minute mop-up
Activities and employment	Economic Activity History - economic activity since last interview (if taken part after September 2006)/September 2006 (if not taken part after September 2006): <ul style="list-style-type: none"> Economic activity, full -time or part - time - if in work or education, institution of study - if in education, temporarily or long -term – if sick or disabled, date started/ended economic activity, Reasons for change in activity Employment at 25 (if not taken part in last interview): job title, job description, main product of organisation, type of organisation 	No
	Current employment: <ul style="list-style-type: none"> Whether full-time/part time employed Job details – job title, job description, main product of organisation, supervising responsibilities, size of workplace/no of employees, qualifications and training Working hours Shift work and work at night between 10pm and 7am Work security Satisfaction with current job Stress at work 	Yes, but only included: <ul style="list-style-type: none"> Whether full-time/part time employed Job details – job title, job description, main product of organisation, supervising responsibilities, size of workplace/no of employees, qualifications and training Working hours Satisfaction with current job Stress at work
	Second job: <ul style="list-style-type: none"> Hours worked 	No
	Prospective employment <ul style="list-style-type: none"> Reasons for unemployment Whether looking for employment Methods used in search for employment Reasons why not looking for employment 	No
	Employment details for first job after full time education: <ul style="list-style-type: none"> Details of first – job title, job description, main product of organisation 	No
	Employment support: <ul style="list-style-type: none"> How found out about current/last job Whether needed highest qualification to get current job/last job 	No
	Partner current activity: <ul style="list-style-type: none"> Whether full-time/part time employed Whether in full-time/part time education Temporary or long-term sick/disabled Job details –including job title, job description, main product of organisation, supervising responsibilities, qualifications and 	Yes

	training, size of workplace/no of employees	
	Economic shocks experienced since coronavirus: <ul style="list-style-type: none"> Whether experienced by cohort member or their (cohabiting) partner Time period of economic shock 	No
Module 4		
Title	Full questionnaire content	Included in 20 minute mop-up
Finance module	Current pay/salary: <ul style="list-style-type: none"> Gross and net pay Self-employed income Take home income second job Other income from paid work 	No
	(Cohabiting) Partner pay/salary: <ul style="list-style-type: none"> Net pay / Self-employed income 	No
	Benefits (including Coronavirus state benefits): <ul style="list-style-type: none"> Universal credit Types/amounts of benefits received 	No
	Other income: <ul style="list-style-type: none"> Source of income, total amount received in last month Total (household) income (cohort member and cohabiting partner) after tax and period it covered 	Yes, but only included: <ul style="list-style-type: none"> Total (household) income (cohort member and cohabiting partner) after tax and period it covered
	Pensions: <ul style="list-style-type: none"> Whether member of pension scheme, type of pension scheme Whether currently contributing to pension Expected retirement income sources 	No
	Debt: <ul style="list-style-type: none"> Types of Debt, Total amount owed Self-assessed management of own finances Whether has difficulty paying bills Financial position during Covid 	No
	Savings and Investments: <ul style="list-style-type: none"> Accounts held Amount of savings and investments 	No
Module 5		
Title	Full questionnaire content	Included in 20 minute mop-up
Education	Academic and vocational qualifications gained and currently studied <ul style="list-style-type: none"> Details of undergraduate degree: university from which obtained degree/or currently studying, whether degree single or joint honours, degree classification, year of graduation, subject of degree, whether university was first choice Details of first choice university: whether applied for same subject at first choice university, single/joint honours at first choice university, subject of degree applied for at first choice university 	Yes, but with reduced detail: <ul style="list-style-type: none"> Highest academic/vocational qualifications Current academic/vocational qualifications studied for

	<ul style="list-style-type: none"> Details of post -graduate degree: university from which obtained/or currently studying Master's degree, masters subject, university from which obtained/or currently studying Doctorate degree, subject of doctorate degree 	
	Fees paid and funding received for UG degree <ul style="list-style-type: none"> Whether received a loan by the Student Loans Company, whether making student loan repayments Scholarships, grants and bursaries received How paid for fees and living expenses while at university/college 	No
	Partner's academic and vocational qualifications	No
Module 6		
Title	Full questionnaire content	Included in 20 minute mop-up
Health	General health <ul style="list-style-type: none"> Self-rated general health ONS harmonised questions on long-standing illness/disability 	Yes, but with reduced detail on long-standing illness/disability.
	COVID-19: <ul style="list-style-type: none"> Experience of COVID-19 Tests taken and results Long COVID Vaccinations 	Yes, but with reduced detail.
	Height and weight: Self-reported height and weight	Yes
	Exercise Sleep Fruit and fizzy drinks intake	No
Module 7		
Title	Full questionnaire content	Included in 20 minute mop-up
Identity	Ethnicity <ul style="list-style-type: none"> Ethnicity Partner ethnicity Self-rated importance of ethnicity 	Yes, but only included: <ul style="list-style-type: none"> Ethnicity
	Identity <ul style="list-style-type: none"> National identity European identity Whether born in the UK /Country of birth and Year moved to the UK Where mother/father was born in UK / Country of birth 	Yes, but only included: <ul style="list-style-type: none"> whether born in the UK.
	Social support: <ul style="list-style-type: none"> Number of close friends, current relationships with friends, family members, community members 	No
	Attitudes: <ul style="list-style-type: none"> Right to abortion, importance of women at work, environment issues 	No
	Civic engagement and politics:	No

	<ul style="list-style-type: none"> Attendance of meeting meetings for local groups or voluntary organisations Unpaid voluntary work Interest in politics Participation in protests Voting in Dec 19 general election and the EU Referendum in 2016 	
	Trust of other people	No
Module 8		
Title	Full questionnaire content	Included in 20 minute mop-up
CASI (Self Completion Module)	Working memory and concentration <ul style="list-style-type: none"> Digit Span Task (Backwards) 	No
	Financial literacy: <ul style="list-style-type: none"> Inflation and interest 	No
	Opinion on immigration	No
	Personality traits <ul style="list-style-type: none"> BIG5 Personality Traits (extroversion, agreeableness, openness, conscientiousness, and neuroticism) Short GRIT scale 	Yes, but only included: <ul style="list-style-type: none"> BIG5 Personality Traits (extroversion, agreeableness, openness, conscientiousness, and neuroticism)
	Well-being and life satisfaction <ul style="list-style-type: none"> ONS Personal wellbeing (life satisfaction, worthwhile, happiness, anxiety) Overall life satisfaction 	No
	Mental health and well-being <ul style="list-style-type: none"> General Health Questionnaire (GHQ12) Generalized Anxiety Disorder questions (GAD2) Patient Health Questionnaire items (PHQ2) Diagnoses depression/serious anxiety and treatment 	Yes, but only included: <ul style="list-style-type: none"> General Health Questionnaire (GHQ12) Generalized Anxiety Disorder questions (GAD2) Patient Health Questionnaire items (PHQ2)
	Loneliness: <ul style="list-style-type: none"> UCLA loneliness scale 	No
	Alcohol and smoking: <ul style="list-style-type: none"> Alcohol Use Disorders Identification Test (AUDIT) Smoking – whether smokes regularly, number of cigarettes usually smoked a day, number of cigarettes usually smoked a day, age when started / last smoked cigarettes regularly Use of electronic cigarette/vaping device 	No
	Illegal drugs <ul style="list-style-type: none"> Drug use – ever, last 12 or 4 months 	No
	Contact with the Criminal Justice System in the last 12 months	No
	Sexual orientation, gender identity and sexual behaviour	No
Smear testing and menarche	No	
Pregnancy histories, fertility treatments and family planning	No	

	Relationship quality and domestic violence	No
	Workplace abuse and discrimination	No
	Adverse childhood experiences <ul style="list-style-type: none"> • Childhood health • Difficult events in childhood (parental separation, death, violence) • Financial difficulties in childhood 	No
Module 9		
Title	Full questionnaire content	Included in 20 minute mop-up
Data linkage	Cohort member permission (if not given at Age 25 Survey) to add: <ul style="list-style-type: none"> • Health records (NHS Digital) • Education records (DfE/HESA, UCAS, SLC) • Economic records (HMRC, DWP) • NI number (if permission to add SLC, HMRC or DWP records given) • Criminal records (MOJ) 	No
Module 10		
Title	Full questionnaire content	Included in 20 minute mop-up
Saliva consent	Permission to send saliva kit post-interview	No
Module 11		
Title	Full questionnaire content	Included in 20 minute mop-up
Contact information	Work contact details (telephone number) (Cohabiting) Partner contact details (telephone number, email) Stable contact details (address, telephone number, email) Social media (Facebook, Twitter, Instagram) details	Yes

After the soft launch phase of the study, the partner data linkage module was excluded from the survey due to low participation rates.

5.3 Instrument development and testing

The survey instruments for the Sweep 9 survey were scripted using IBM SPSS Data Collection (also known as Dimensions) V6.0.1. The CAPI and online scripts were programmed using the same software in order to facilitate the efficient transfer of sample information, updates and questionnaire data between online and face-to-face interviews. The script drew on information contained within the sample file (FMS and ECS). The information included questionnaire data from previous waves and variables specific to the current wave.

Variations between the online and CAPI scripts were relatively modest focussing on adapting the questions to be mode appropriate. The scripts for interviewer-administered methods (i.e. In-home, Teams and telephone) included interviewer instructions to refer to showcards or read out, whilst the online script included variations in question wording to assist online self-completion. All versions of the questionnaire specification and scripts were signed off by CLS. The layout and branding of the script were aligned with the Next Steps brand guidelines as far as possible, including the use of brand logos and colours.

5.3.1 'Don't know' or 'Prefer not to say options'

In the online script (online, Teams, secondary devices), or in the self-administered section of the CAPI script the "Don't know" or "Prefer not to say" options were available for the respondents for the majority of the questions. These options were not visible at first to discourage their use. If a respondent decided they would not like to answer a question, they could click "Next" without selecting an answer and then the "Don't know" and "Prefer not to say" options would appear. The respondent would then have to select an answer before moving on to the next question. Respondents were informed about how they can skip questions they do not wish to answer at the beginning of the survey. Any question with a sensitive nature would have explicit "Don't know" and "Prefer not to say" options.

In the CAPI script, "Don't know" or "Prefer not to say" options were explicit but would have been labelled as "DO NOT READ OUT", except for questions which had explicit "Don't know" or "Prefer not to say" options in the online script which the interviewer would read out. Additionally, the CASI sections of in-person and Teams interviews were similar to the online script in terms of treatment of these response options.

5.3.2 Script quality control

A significant amount of time was spent ensuring the accuracy of the script. Once the script was completed a dummy data file was created to ensure accurate data flow between the script and the sample file.

Routing

The script included automated routing to ensure that cohort members were correctly routed to the next question or section based on their previous answer(s). This ensured that cohort members only answered sections of the questionnaire relevant to them whilst avoiding manual routing errors by interviewers.

Soft and hard checks

Soft and hard checks were scripted when an unexpected answer was entered into the script. When an unexpected answer was entered an error message was displayed. The messaging for soft checks queried whether the information entered was correct and allowed the interviewer/respondent to proceed if they confirmed the answer was correct, whilst hard checks would not allow the interviewer/respondent to proceed until the answer was updated, or a previous answer corrected.

5.3.3 Question types

The Next Steps questionnaire displayed questions in a number of ways depending on the question format and the mode of completion:

Single-code answer options were listed vertically with radio buttons to the left.

There are a few more quiz type questions.

Please don't worry if you can't answer them. Some of them are meant to be difficult.

If you are unsure of your answer please give your best estimate.

If the inflation rate is 5% and the interest rate you get on your savings is 3%, will your savings have more, less or the same amount of buying power in a year's time?

- More
- Less
- The same

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Figure 4 Single-coded question example from the online script

Multi-code answer options were also listed vertically with tick boxes to the left.

Do any of your conditions or illnesses affect you in any of the following areas?

Select all that apply.

- Vision (for example blindness or partial sight)
- Hearing (for example deafness or partial hearing)
- Mobility (for example walking short distances or climbing stairs)
- Dexterity (for example lifting and carrying objects or using a keyboard)
- Learning, understanding or concentrating
- Memory
- Mental health
- Stamina, breathing or fatigue
- Socially or behaviourally (for example autism, Attention Deficit Disorder or Asperger's Syndrome)
- Other (please describe)

- None of these

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Figure 5 Multi-coded question example from the online script

Collapsible grid questions listed the series of questions vertically with the answer options revealed under the first statement. After the first question is answered, the options for the first question collapses and the options for the second question appears, and so on. This collapsible grid is adapted to accommodate the display on mobile devices.

When answering the following questions, think about your current relationships with friends, family members, community members, and so on. Please indicate to what extent each statement describes your current relationships with other people.

▼ I have family and friends who help me feel safe, secure and happy

- Very true
- Partly true
- Not true at all
-

▶ There is someone I trust whom I would turn to for advice if I were having problems

▶ There is no one I feel close to

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Figure 6 Grid question example from the online script

Where an **'other (specify)'** category was included in a set of options (be it a single-code, multi-code, or grid question), a text box was displayed to the right of the answer option to allow the cohort member to expand upon their answers. Please see figure below as an example.

Do any of your conditions or illnesses affect you in any of the following areas?

Select all that apply.

- Vision (for example blindness or partial sight)
- Hearing (for example deafness or partial hearing)
- Mobility (for example walking short distances or climbing stairs)
- Dexterity (for example lifting and carrying objects or using a keyboard)
- Learning, understanding or concentrating
- Memory
- Mental health
- Stamina, breathing or fatigue
- Socially or behaviourally (for example autism, Attention Deficit Disorder or Asperger's Syndrome)
- Other (please describe)

- None of these

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Figure 7 Other (please specify question example

Open-code questions (text or numeric) were displayed as a text box below the question text. For text answers the initial size of the box reflected the anticipated length of the answer, although these could be expanded if required. Where applicable, text boxes for numeric answers would have units displayed either side (for example a '£' symbol). Where multiple units were required, these were split over two answer boxes (e.g. 'Feet' and 'Inches' separately when recording height).

Suppose you put £100 into a savings account with a guaranteed interest rate of 2% per year. You don't make any further payments into this account and you don't withdraw any money.

How much would be in the account at the end of the first year, once the interest payment is made?

Please enter the amount to the nearest pound (£).

If unsure, enter your best estimate.

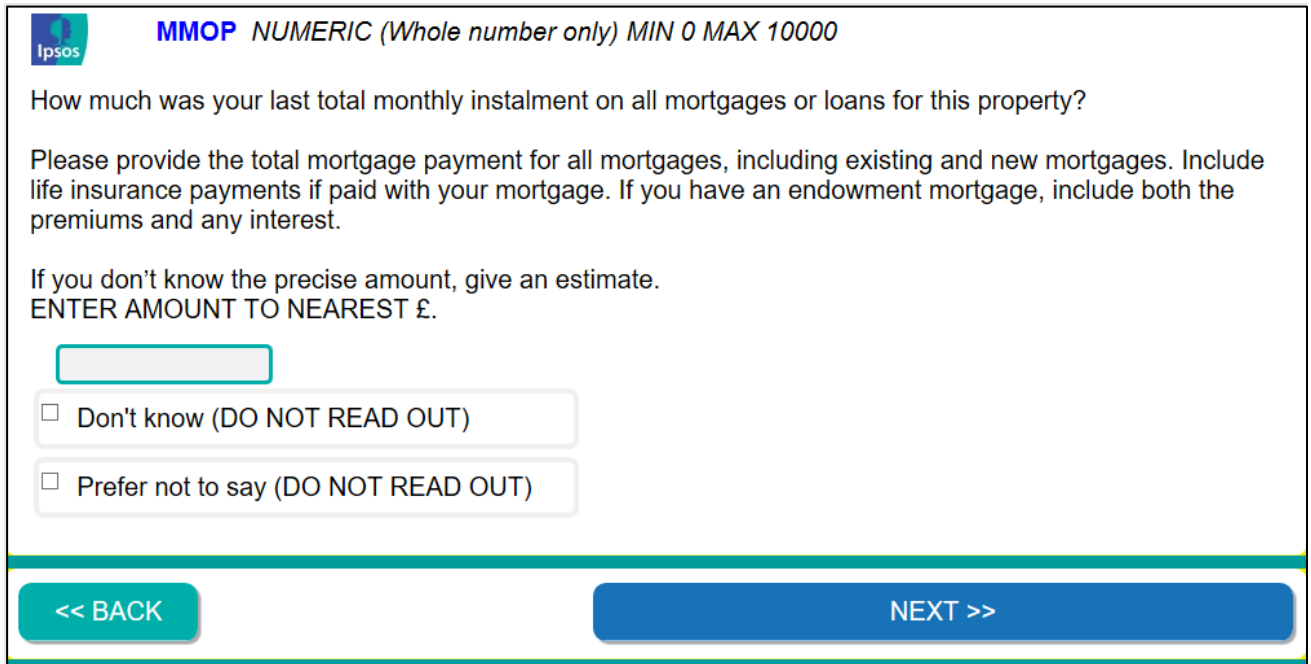
£

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Figure 8 Numeric question example from the online script

Answer scales were either purely text-based, where cohort members entered a numeric answer into a number box, or employed a visual scale with numbered points and labelled endpoints, where cohort members selected an answer using radio buttons.

The collection of personal **numeric questions** where the cohort member could not provide a precise amount were estimated making use of a branching technique. These questions are called unfolding brackets questions.



Ipsos **MMOP** NUMERIC (Whole number only) MIN 0 MAX 10000

How much was your last total monthly instalment on all mortgages or loans for this property?

Please provide the total mortgage payment for all mortgages, including existing and new mortgages. Include life insurance payments if paid with your mortgage. If you have an endowment mortgage, include both the premiums and any interest.

If you don't know the precise amount, give an estimate.
ENTER AMOUNT TO NEAREST £.

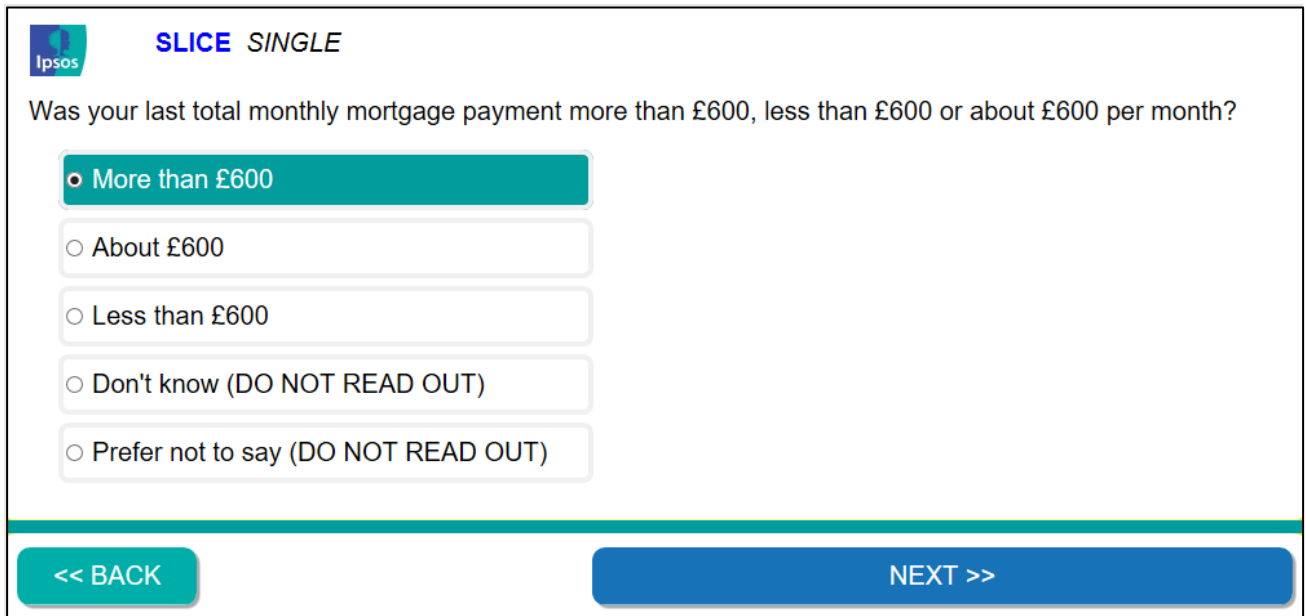
 Don't know (DO NOT READ OUT)
 Prefer not to say (DO NOT READ OUT)

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Figure 9 Numeric main question

Should the cohort member not be able to recall the precise number or estimate, a new series of questions aimed at establishing the range within which the amount falls were provided. Respondents were asked to estimate whether the amount falls above or below the amount provided in the script. The range of amount in the first unfolding question of the series was randomised.



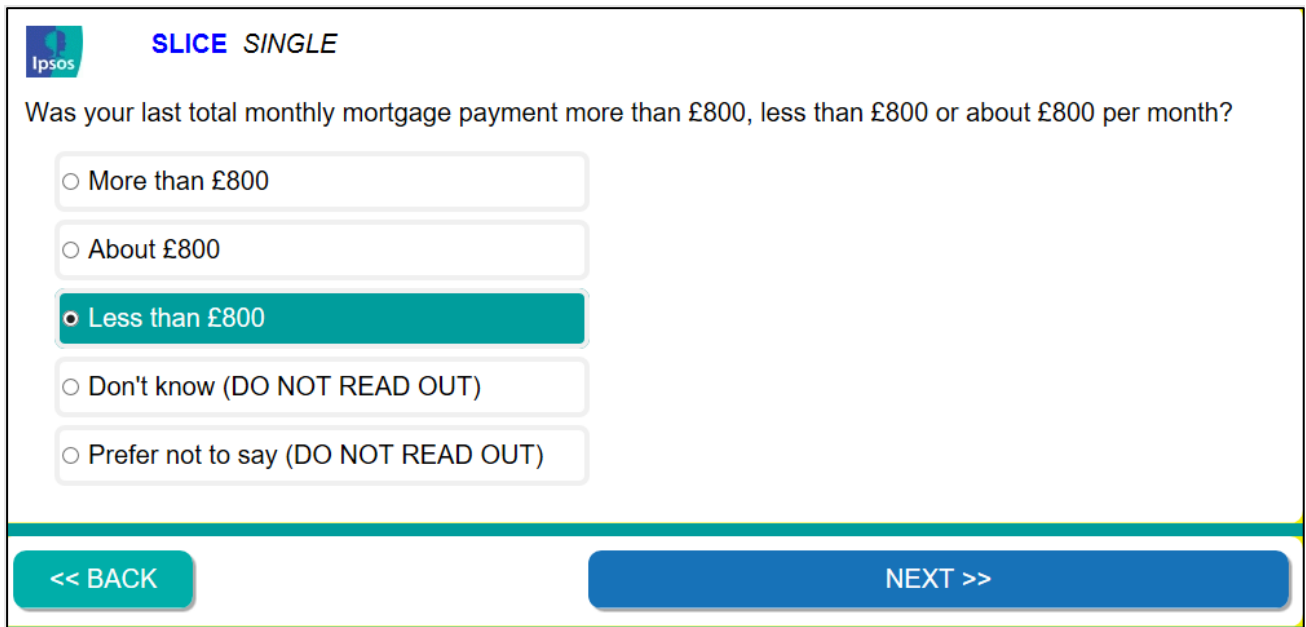
Ipsos **SLICE SINGLE**

Was your last total monthly mortgage payment more than £600, less than £600 or about £600 per month?

- More than £600
- About £600
- Less than £600
- Don't know (DO NOT READ OUT)
- Prefer not to say (DO NOT READ OUT)

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Figure 10 Numeric first prompt screen



Ipsos **SLICE SINGLE**

Was your last total monthly mortgage payment more than £800, less than £800 or about £800 per month?

- More than £800
- About £800
- Less than £800
- Don't know (DO NOT READ OUT)
- Prefer not to say (DO NOT READ OUT)

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Figure 11 Numeric second prompt screen

5.3.4 Help links and videos

For certain questions, URL links were included below the question text as additional help to allow cohort members and interviewers to access additional information to assist cohort members to answer a question. If clicked on, these would open a pop-up with more information relevant to the question.

Participants were encouraged to watch videos providing more information about saliva collection and data linkage. These were accessible via links provided in materials and in the survey.

Explanatory videos were included for the special elements of the questionnaire.

Interviewers also had access to FAQ documents covering saliva collection and data linkage.

5.4 Special elements

The Sweep 9 survey included a number of special elements as part of the Next Steps survey.

5.4.1 Data linkage

Cohort members that took part in the Age 25 Survey in 2015, were asked for their consent to collect information from their health, education, economic and criminal records. These permissions remain valid unless cohort members choose to withdraw their consent by contacting CLS or Ipsos. During the Sweep 9 survey cohort members were asked about the linkages that they did not consent to at Sweep 8. The following linkages were covered:

- NHS England, which maintains health records encompassing Primary Care data concerning visits to family doctors and other health professionals, as well as Hospital Episode Statistics (HES), which cover admissions and attendance at hospitals.
- The Department for Education, and the Higher Education Statistics Agency hold records that contain details on school, further and higher education participation and achievements, as well as information about the specific educational institutions attended, such as schools, colleges, universities, or training centres.
- The Universities and Colleges Admission Services (UCAS) maintain records that include information pertaining to higher education applications and offers. The Student Loans Company (SLC) also keeps records that encompass details regarding student support payments.
- His Majesty's Revenue and Customs (HMRC) hold records that incorporate information concerning employment, earnings, tax credits, occupational pensions, and National Insurance Contributions. The Department for Work and Pensions (DWP) also maintains records that include data on benefit claims and participation in employment programs.
- Records kept by the Ministry of Justice (MOJ) include information regarding police arrests, official cautions, convictions, and sentences.

Cohort members who grant permission for either DWP, HMRC, or SLC records to be integrated were also asked to provide their National Insurance number (NINO).

5.4.2 Standard Occupation Coding and Standard Industry Classification module

The Standard Occupation Coding (SOC) and Standard Industry Classification (SIC) is a classification system designed by the Office for National Statistics (ONS) that assigns a unique code to each occupation based on its tasks, skills and knowledge required. The coding system is designed to provide a standardised and consistent method of classifying occupations, allowing for easier comparison and analysis of employment data across different industries and sectors. Each occupation is assigned a four-digit code, with the first two digits representing the major group or category of the occupation, and the last two digits providing more specific details about the occupation.


Information about occupations is typically collected by asking participants to provide their job title and open-text descriptions of their job and the industry in which they work. This information is then coded to the SOC classification manually by office coders. There is some concern that web participants may not provide sufficient detail to allow accurate coding to be conducted. As such there is interest in developing new approaches to collecting this information in web surveys. The Next Steps Sweep 9 sought to test a look-up approach in which participants would enter key details about their current job and then be presented with a list of potential SOC codes from which they would self-select the most appropriate. In order to investigate whether this approach would lead to more accurate coding, participants were also asked to provide open text descriptions of their jobs which would be manually coded. The level of consistency of coding between these two approaches could then be compared. Office coding was conducted twice, by two independent coders in order to investigate whether the level of consistency between the look-up codes and codes assigned by an office coder differs from the level of consistency one would observe between two different manual coders.

Participants who had not taken part in Sweep 8 were also asked to describe their first job and their job at 25. Those with a partner were asked to describe their partner's job. The look-up approach was used to collect information about these jobs, though where no occupation was selected from the look-up an open text description was collected for office coding.

In-interview coding via look-up

In the look-up approach participants were asked to enter their job title and key words which described their occupation. A trigram search was conducted on the SOC2020 index, and a list of potential codes was displayed. Participants could refine the list by amending their job title or keywords. Respondents also had the option to select "Job not found" if they felt that none of the codes from the list were suitable.

Figure 12 Cohort member SOC coding screen

SOCKEY2_NEW

Your job title is:

In that job you mainly:

Which of the following option best describes your job?

INTERVIEWER: READ OUT LIST OF JOBS BELOW.
If none of the options are suitable I can change the job title and/or job description and search again. Adding more words will narrow the search.
INTERVIEWER: IF YOU CAN'T FIND A SUITABLE JOB AFTER ALTERING THE SEARCH TERMS SELECT 'JOB NOT ON LIST'.

- Teacher, dancing (primary school) | 2314
- Teacher, dancing (special school) | 2316
- Teacher, dancing (secondary school) | 2313
- Teacher, school, comprehensive | 2313
- Teacher, school, junior | 2314
- Teacher, school, nursery | 2315
- Teacher, school, play | 6111
- Teacher, school, preparatory | 2314
- Teacher, school, primary | 2314
- Teacher, school, secondary | 2313
- Teacher, school, upper | 2313
- Teacher, pre-school | 6111
- Teacher, pre-school, professional | 2315
- Teacher (junior school) | 2314
- Teacher (nursery school) | 2315
- Teacher (primary school) | 2314
- Teacher (special school) | 2316
- Teacher (secondary school) | 2313

Post-interview manual coding by office coders

Manual coding was conducted by two office coders for all current job. The variables supplied to the coders varied depending on whether an in-interview code was found. The below table shows the variables provided to the coders in the two different scenarios.

Table 25. Variables used for post interview manual coding for cohort member’s current job

Variables name	Variable description	Variable provided to coders	
		In-interview code found	In-interview code not found
FF_title8 or CJTITLECUR	Job title	Yes	Yes
CJDO2	Detail job description	Yes	No
CJDO	Detail job description	No	Yes
CJQUALOTHER	Special qualifications required to do the job (if any)	Yes	Yes
CJFIRM	Main produce of firm or organisation	Yes	Yes
CJDO_LU_OE	Key word job description	No	Yes
SOCKEY2_new_job_title	Final job title used in the look up question	No	Yes
SOCKEY2_new_job_desc	Final job description used in the look up question	No	Yes

If no interview code was found for the job at age 25, CM’s first job and partner’s job, manual coding was also conducted based on the provided job title, job description, industry in which they worked, as well as special qualification needed to perform the job (available only for partner’s job, and not first job or job at age 25) and the search terms used for the look up question.

Soft launch missing SOC variables

During the soft launch phase, an issue occurred in the functioning of the script with the in-interview coding, resulting in the loss of data about individual’s details for their job, including the final job title and job description used at the look up question, as well as their self-selected SOC code and detailed description of their job. Specific variables that were affected are listed in the appendix. A total of n=988 cases were affected by this error. On May 18, 2022, the script was modified to correct this error.

SOC coding for these affected cases was conducted using the available information, including their open text job titles and keywords describing their job which cohort members entered ahead of the lookup screen, open text description of their duties (when a lookup SOC code wasn’t selected), the industry they work in, as well as special qualifications needed for the job (if any). Using data collected in later waves once this issue was fixed Ipsos conducted a comparison between data collected using the complete variable list and data collected with the limited number of responses to examine the impact of the missing data. Further details regarding this comparison will be provided in Chapter 9.

5.4.3 Sensitive questions module

Module 8 of the questionnaire encompassed a set of questions that were of a more sensitive nature and deemed most suitable for self-completion by the cohort member. This self-completion module asked questions covering well-being, depression, drinking, smoking, drugs, crime, gender identity, sexual behaviour, pregnancy history, and childhood circumstances. This module also included financial literacy questions. During this module, cohort members were also invited to complete a cognitive assessment – the Backwards Digit Span – which was described to participants as a ‘number sequence task’ (see section 5.4.8). The table below provides an overview of how the self-completion section was administered in each mode of data collection.

Table 26. Self-completion questionnaire administration by mode

Method	Mode
Online	The self-completion script was part of the main script and was completed by the cohort member.
In-home interview	The CAPI tablet was handed over to the cohort member to complete. Cohort members could request the interviewer to read-out the self-completion module should they experience difficulty with reading or sight problems.
Remote method: Secondary device	The self-completion script was part of the main script and completed by the cohort member.
Remote method: MS Teams interview	<p>The script functioned as a normal online survey. Interviewers were requested to wait on the Teams call until the cohort member completed the online self-completion section.</p> <p>For cohort members that requested assistance, the interviewer would offer to share their screen and could select one of the following options:</p> <ul style="list-style-type: none"> • The cohort member could read the content on the screen and instruct the interviewer which number to capture. • The interviewer read the question to the cohort member in full <p>Interviewers were instructed to keep sharing their screen throughout the interview.</p> <p>Cohort members were provided with an online link to complete the self-complete module in a separate browser window on their own computer where the interviewer could not observe the participant’s responses.</p>
Remote method: Telephone with e-showcards	The interviewer was requested to read out the self-completion module to the cohort member.

Cohort members were provided with an option whether they would like to skip the self-completion section if the interview was conducted in-home, by Teams and/or by telephone. Cohort members completing the self-completion section online or via secondary device were not provided with this option, however a ‘prefer not to

answer' option was available for each question in the self-completion module. Interviewers had to record whether they assisted in the completion or whether it was completed by the cohort member.

5.4.4 Saliva collection

Cohort members were asked to provide a saliva sample from which DNA will be extracted to be stored and analysed for research purposes. A saliva booklet was included in the advance mailing (please see Chapter 6 Advance Mailing) informing the cohort member that they will be asked to provide a sample. Consent to provide a sample was collected electronically during the interview within the script.

In-home interviewing

Interviewers were not asked to assist the cohort member with collecting the saliva. During an in-home interview, interviewers would provide the saliva collection kit if the cohort members consented to giving a saliva sample. The interviewer would provide instructions to the cohort members to collect the saliva sample. The script prompted the interviewers to remind the cohort member not to eat, drink or smoke 30-minutes before providing a sample. The interviewers were instructed to scan the QR code (linking the sample to the cohort identifier) on the outer layer of the packaging before handing the cohort member the saliva kit.

Interviewers instructed cohort members to watch an instruction video before providing the saliva sample. Once the cohort member has completed the process, they then handed the saliva kit back to the interviewer to be posted using a standard post box. Should the respondent not have been able to complete the saliva collection process whilst the interviewer was conducting the home visit, cohort members did have the option to post the kit to the lab themselves at a later date.

All other methods

Cohort members completing the survey making use of any of the other methods were sent a saliva kit and requested to post it back at their earliest convenience, if they provided consent as part of the questionnaire.

Saliva kit content

The saliva kit included the following items:



Figure 13 Saliva kit content

- A covering letter with a link to a saliva video explaining the process
- An instruction booklet
- A plastic specimen bag to place the saliva tube in for return with absorbent material inside
- A white “exempt human specimens” jiffy bag for return (postage paid for return)
- A serial number label sheet (cryogenic labels to attach to tube and bag)
- A Oragene saliva kit

Saliva kits were posted to Bristol University for DNA to be extracted from the saliva sample. Samples will be stored in a laboratory at the University of Bristol which is licensed by the Human Tissue Authority. Access to the laboratory is restricted to authorised personnel. The samples were anonymised, and the laboratory do not have access to any of cohort member’s personal information.

5.4.5 Cognitive assessment

The cognitive assessment included in the interview was a number sequence task (Harvard’s TestMyBrain (TMB) Backwards Digit Span) within the self-completion module. A generic version of the Backward Digits Span test can be accessed here:

<https://www.testmybrain.org/tests/DigitSpan/backwardSpan.html>

The cognitive assessment is used to better understand working memory. Working memory is the capacity to hold small amounts of information in an active, easily accessible state, usually for less than 30 seconds at a time. Examples include keeping a new phone number in working memory long enough to dial the number, and keeping a new, important meeting date & time in your active memory long enough to write it down.


The task involved the participant memorising a sequence of digits and then recalling them in the reverse order (for example, ‘1’, ‘2’ would be recalled as ‘2’, ‘1’). The sequence starts with two numbers and increases as it progresses. The maximum number of digits it reaches is 11.

The assessment consisted of a demonstration and practice and then the main task. For each sequence length (e.g. 3, 4, 5) the participant was allowed two attempts and the task terminated when the participant made two incorrect attempts at the same sequence length, or if they completed the 11-digit sequence. Cohort members would also have the option to terminate the task early.

Cohort members generally completed the task themselves. However, for telephone interviews, interviewers used a laminate (please refer to figure below), read the assessment to the participant and entered the answers

they provided on their behalf. For interviews conducted via Teams and in-home CAPI where the participant asked the interviewer to read out the self-completion module, the interviewer used the laminate to read the assessment to the participant. The adaptations in the laminate only include minimal altering of the wording/instructions so they are appropriate for reading out rather than self-completion. For example, 'press the numbers' would be shown on screen but would be read out as 'say the numbers'.

Data were collected online (via TMB's website) and via Ipsos' CAPI tablets (via a Progressive Web Application which TMB produced).



NUMBER SEQUENCE TASK - ADMIN SCRIPT

This table guides you through the initial practice in the number sequence task. Please refer to the wording in the 'read out' column when administering the task.






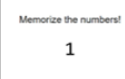
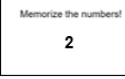
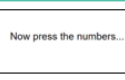
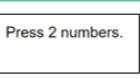

SCREEN NO.	SCREENSHOT	READ OUT	ACTIONS / NOTES
1 – Intro screen			NO NEED TO READ ANYTHING OUT – JUST PRESS 'CLICK HERE FOR INSTRUCTIONS'
2	  	I am going to say some numbers. Try to remember these numbers.	THEN PRESS 'CLICK HERE TO CONTINUE'.
3		Then say the numbers in reverse order . Let's practice!	YOU DON'T HAVE TO TYPE ANYTHING. JUST PRESS 'CLICK HERE TO CONTINUE' TO START THE PRACTICE.
4	 	Remember the numbers: 1, 2	
5	 	Now say the numbers. Say 2 numbers.	PRESS THE NUMBERS RESPONDENT TELLS YOU ON THE KEYBOARD.
6a		Correct!	DISPLAYS IF RESPONDENT SAYS THE NUMBERS IN CORRECT REVERSE ORDER: "2, 1" THEN SKIP TO SCREEN 7

Figure 14 Number sequence task laminate.

5.5 Questionnaire length and section timings

5.5.1 Overall questionnaire length

Timestamps were used to measure the script's length, section lengths, and time spent on specific questions. The dataset is analysed focusing on the total survey length and section lengths. Participants who didn't complete the survey in one sitting were excluded from this analysis leaving 4,045 cases. Outliers were removed from the overall length and each section. Two timings are reported: time spent on questions and total survey time. The timings are shown for full survey completions and the shorter mop up survey.

Table 27. Overall questionnaire length by method – in minutes (full survey)

Method	Online & Secondary device	In-Home	MS Teams	Telephone	All modes
Number of cases:	3,316	622	2	105	4,045
Mean (questions only)	54.2	85.8	69.0	84.3	58.8
Median (questions only)	50.3	84.0	69.0	81.0	54.5
Base:	3,174	617	2	104	3,897
Mean (link to submission)	59.2	91.5	78.5	91.1	65.2
Median (link to submission)	55.0	88.0	78.5	90.0	60

Table 28. Overall questionnaire length by method – in minutes (mop up survey)

Method	Online
Number of cases:	306
Mean (questions only)	20.0
Median (questions only)	18.6
Number of cases:	306
Mean (link to submission)	20.6
Median (link to submission)	19.0

5.5.2 Questionnaire module timings

The tables below show the amount of time taken to complete each of the modules, again removing anyone who completed the survey in more than one sitting, and only including those within specific ranges within the section we are reporting on. Timings here are presented for those who completed the full survey.

Table 29. Questionnaire module timings – in minutes (full survey)

Module	Online (including secondary device)			In-home		
	Number of cases	Mean (minutes)	Median (minutes)	Number of cases	Mean (minutes)	Median (minutes)
Household relationship	3,253	5.3	4.8	550	7.9	7.7
Housing	3,315	3.1	2.6	634	3.9	3.6
Activities & employment	3,068	9.2	8.6	526	11.1	11.3
Finance	3,234	5.8	5.2	615	7.5	7.2
Education and training	3,329	2.2	1.9	635	2.4	1.8
Health and wellbeing	3,282	5.0	4.5	623	7.3	7.0
Identity and participation	3,324	3.1	2.7	630	5.5	5.4
Self-completion	3,156	17.0	16.4	532	20.6	21.4
Data linkage	3,310	1.2	1.1	603	2.5	2.3
Saliva collection	3,325	1.0	0.7	557	2.7	2.0
Future contact details	3,316	2.0	1.6	611	3.8	3.5
Admin module	3,322	0.7	0.6	629	0.6	0.5

Module	MS Teams			Telephone		
	Number of cases	Mean (minutes)	Median (minutes)	Number of cases	Mean (minutes)	Median (minutes)
Household relationship	2	5.3	5.3	95	7.4	7.0
Housing	2	2.8	2.8	108	3.6	3.2
Activities and employment	2	11.3	11.3	96	11.8	11.7
Finance	2	8.1	8.1	105	6.9	6.4
Education and training	2	1.3	1.3	108	3.0	2.4
Health and wellbeing	2	5.8	5.8	107	6.7	6.6
Identity and participation	2	5.0	5.0	106	5.5	5.3
Self-completion	2	27.3	27.3	79	22.5	23.9
Data linkage	2	3.4	3.4	105	2.6	2.1
Saliva collection	2	1.5	1.5	107	1.7	1.3
Future contact details	2	3.3	3.3	106	3.7	3.3
Admin module	2	1.3	1.3	106	0.9	0.7

The tables below show the amount of time taken to complete each of the modules for the shorter mop-up survey, again removing anyone who completed the survey in more than one sitting, and only including those within specific ranges within the section we are reporting on.

Table 30. Questionnaire module timings – in minutes (20-minute mop-up survey)

Module	Online		
	Number of cases	Mean (minutes)	Median (minutes)
Household relationship	312	5.5	5.0
Housing	316	0.7	0.5
Activities and employment	313	4.4	4.0
Finance	316	1.3	0.9
Education and training	244	0.8	0.6
Health and wellbeing	316	2.1	1.7
Identity and participation	316	0.2	0.1
Self-completion	315	3.6	2.7
Data linkage	72	0	0
Saliva collection	316	0	0
Future contact details	315	1.9	1.4
Admin module	314	0.8	0.7

6 Fieldwork

6.1 Ethics and consent

Ethical approval for the Sweep 9 Next Steps survey was secured by CLS from the NHS Research Ethics Committee (NRES) – REC Reference 22/EE/0052.

6.1.1 Consent

Consent was required for all elements. At the start of the interview cohort members were provided with the following question:

“As always, taking part is entirely voluntary. If you don't know the answer or don't want to give an answer to a question, you can simply leave it blank and click Next. Your answers are very important to us as they help us understand the issues affecting people of your age today. The information you give will be treated in strict confidence in accordance with the General Data Protection Regulation (GDPR) and used for research purposes only.

Are you happy to proceed with the interview?”

Interviewers had a copy of the privacy policy available should cohort members have requested it. Reference to the privacy policy was also made in the advance materials and were available for cohort members to access online on the Next Steps website.

6.1.2 Data linkage consent

Participants were asked for their consent for information from their administrative records to be linked to their survey data. A booklet was included in the advance mailing which provided information about the research value of linking administrative records and described how the linkage would be conducted. A video was included in the questionnaire script which interviewers were instructed to show to participants and web completers could view online. The script also included a series of Frequently Asked Questions. Participants were asked about a number of record types and asked to provide permission to link each record type separately. Consents were recorded electronically in the script. Once all consent questions were asked a summary screen was presented to the participants which confirmed the decisions taken. Participants were asked to confirm that the consents were recorded correctly and to confirm that they:

- Have been provided with all the information required
- Have had the opportunity to ask questions
- Understand what personal information will be used for matching purposes

- Understand that information will be treated in accordance with DPA and GDPR
- Understand consents would remain valid unless they were withdrawn
- Understand how they can withdraw consent

Participants were sent a thank-you letter after completing their interview. The thank you letter confirmed which permissions had been provided, including any consents from the Age 25 sweep. Participants were informed that they could contact CLS if they wished to change any of their decisions.

6.1.3 Saliva consent

Consent for a saliva sample to be collected was asked electronically during the in-home interview within the script. The script prompted the interviewer to provide the cohort member with the saliva kit and wait for the cohort member to collect the sample before posting it on their behalf. For all other methods, once a cohort member provided electronic consent the script created a flag for head office to dispatch a saliva collection kit to the cohort member's home. Cohort members were requested to post the kit back using a standard mailbox.

6.2 Online only fieldwork

Advance materials were posted and e-mailed (where applicable) to cohort members inviting them to participate in the online only phase of the fieldwork and the fieldwork was scheduled over a three-week period. Cohort members that completed the survey during this period were eligible to receive a higher incentive amount (£30) compared to the face-to-face fieldwork phase (£20).

6.3 Face-to-face fieldwork

6.3.1 Interviewer training

Interviewers attended two half-day briefings prior to commencing work on the project. They were also provided with a training manual.

The training manual covered the following topics:

1. About Next Steps
2. The survey process
3. Sample management
4. Tracing
5. Securing participation and engagement
6. Ethics, confidentiality and the consent process
7. The data collection instrument
8. Interviewer administration

The briefings were conducted online over a two day period and covered the following topics:

Table 31. Interviewer briefing content

Day 1 (09:30-13:00)	Day 2 (09:30-13:00)
About Next Steps	Overview of survey modules
Survey process	Cognitive assessment
Securing participation and respondent engagement	Data linkage
	Saliva collection
Ethics	Incentives
Data collection instrument overview	Tracing
Self-completion questionnaire	Sample management
An introduction to cognitive assessment	Field administration

The master briefing took place on 03/05/2022 and 04/05/2022 with five subsequent training sessions scheduled from 05/05/2022 until 06/06/2022. A total number of 202 interviewers attended these sessions. After the completion of the soft launch four additional training sessions were scheduled for interviewers available to work on the survey. Existing interviewers that previously attended the training were requested to attend a 90-minute training session informing them of the changes that were incorporated between the soft launch and the start of the main phase of data collection. These sessions were scheduled between 22/11/2022 and 06/12/2022. Two additional sessions were with new interviewers between 24/01/2023 and 02/02/2023.

In addition to the project specific training, Ipsos interviewers are required to attend GDPR Learning Management System training on an annual basis. It is also mandatory for all Ipsos interviewers to attend a course on the usage of the Ipsos Electronic Contact Sheet (ECS) system. Interviewers also had to attend a mandatory MS Teams training workshop to ensure that they could confidently carry out Teams video interviews if requested by the cohort members.

6.3.2 Interviewer profile

Ipsos has a diverse pool of interviewers. The table below provides an in-depth look at the Next Steps interviewer panel.

Table 32. Interviewer profile of the Next Steps Age 32 main stage fieldwork team

Category		
Gender	Count	Percentage
Male	109	54
Female	93	46
Age band		
25-34 years	9	5
35-44 years	23	11
45-54 years	38	19
55-64 years	77	38
65+ years	55	27
Experience		
Up to one year	41	20
Two years	35	17
3-5 years	39	19
6-10 years	31	15
More than 10 years	56	28

6.3.3 Mode of first contact

Details of the cohort members who did not complete the online survey during the initial three-week fieldwork period were handed over to the Ipsos fieldwork team to be contacted. Initial contact with cohort members passed to interviewers was either by telephone (40% of the sample) or face-to-face (60% of the sample). The ECS instructed the interviewer which method to use first for each cohort member in their sample. Telephone first was assigned to cohort members, unless one of the following applied:

- The cohort member was unproductive at the previous sweep (Age 25).
- No telephone contact details were available for the cohort member.

Telephone first

Interviewers were instructed to:

- Try all the cohort member's telephone numbers provided on the ECS at least **5 times**. Calls were made at different times of the day (morning, afternoon and evening) and on different days of the week. Furthermore, interviewers had to wait at least one week between the first and last call.
- Should the interviewer work in the area where the cohort member is based and if the interviewer thought it appropriate, face-to-face contact could be attempted before a week had passed since attempting to contact the cohort member by telephone.
- Interviewers were also allowed to attempt face-to-face contact if the telephone contact details were not valid.

Face-to-face first

Interviewers had to make at least **five face-to-face visits** (six face-to-face visits during the soft launch phase) over the fieldwork period to attempt contact. At least four of these visits had to be during evenings (after 18:00) or at weekends. All of the visits had to be on separate days, and interviewers were instructed to leave a period of at least **two weeks** between the first and the last visit.

After the completion of online only phase, cohort members that either completed the survey or refused were removed from the sample. The remaining sample was handed over to the fieldwork team to contact. The majority of cases (60%) allocated to the face-to-face fieldwork – were face-to-face first cases as per the table below. This is indicative of the fact that the cohort members who were less likely to take part online were those who had not recently participated in the survey either due to lack of interest in the study or because their address details were not up to date and tracing is required.

Table 33. Method of contact allocation – Face-to-face phase

Fieldwork stage	Soft launch		Wave 1		Wave 2		Wave 3		Total	
	Count	%	Count	%	Count	%	Count	%	Count	%
Face-to-face first	1,186	60%	1,553	62%	1,541	60%	734	57%	5,014	60%
Telephone first	797	40%	932	38%	1,021	40%	547	42%	3,297	40%
Total	1,983	100%	2,485	100%	2,562	100%	1,281	100%	8,311	100%

6.3.4 Interviewer administered modes

Web non-respondents were issued to interviewers after 3 weeks. Interviewers were able to use the following modes to gain participation:

Table 34. Available modes

Method	Summary
1. In-home interviewing	Normal in-home interviewer administered survey using a CAPI tablet. Cohort member encouraged to complete self-completion section by themselves.
2. Remote method: Secondary device	Interviewer visits address handing over a 'secondary device' (small tablet) and survey log in details to participant. The device is left with the participant to complete the survey. The interviewer then returns to collect the device at an agreed time. A limited number of secondary devices were available and only 70 interviewers were allocated a device, weighing costs to potential use of this mode. This method was not offered to cohort members where the interviewer did not have access to a device.
3. Remote method: Teams interview	Interview conducted using a video call. Interviewer shared their CAPI screen with participant via Microsoft Teams at appointed time. Self-completion module was completed via a separate online survey during interview. Interviewer waited on the Teams call while participant completed the self-completion module.
4. Remote method: Telephonic with e-showcards	Telephone interview with showcards for longer lists. Showcards posted, hand delivered to participant or accessed online in advance of the interview by interviewer.

Cohort members were encouraged to complete the interview in-home, however if the cohort member was reluctant, remote options were offered to the respondent.

Partially completed interviews (useable partials, i.e. who completed the household module but did not finish the survey) from the online only phase were assigned to interviewers. The interview script was adapted to enable the completion of partially conducted interviews via a different mode. The subsequent table explains the interchangeability between different modes. However, it is important to note that face-to-face interviews did not permit device interchangeability. Thus, if a cohort member initiated the interview with an in-home

interviewer, they were required to conclude it in the same mode. Cohort members who chose to complete the interview using secondary devices had the flexibility to switch between the secondary device and their individual device (online completion). Interviews that commenced by telephone could be completed in-home.

Table 35. Method switching

Method survey started in	Switch method(s)
Secondary device	Online interview (CAWI)
Telephone with e-showcards	In-home interviewing (CAPI)
Computer assisted online interview (CAWI)	Secondary device

6.3.5 Tracing

Tracing is a vital aspect of all longitudinal studies.

Interviewers were requested to make reasonable attempts to trace and contact cohort members and to follow a tracing protocol once it has been confirmed that:

1. The cohort member does not reside at the given address.
2. The interviewer was unsure whether the cohort member is living at the address after multiple unsuccessful contact attempts.
3. The address was inaccessible, or the interviewer could not find the address.

The tracing protocol involved the following steps:

- If the cohort member has moved from the issued address, asking the **current occupier** if they can provide a forwarding address or details of relatives/friends of the cohort member who live nearby.
- If the current occupier was reluctant to reveal details, interviewers left a **tracing letter** with them to forward to the cohort member.
- If no contact was made with the current occupier, interviewers left an **occupier letter – for tracing** at the address on their last face-to-face visit.
- **Optional:** face-to-face visits to neighbours (tracing letters used if necessary) (this was mandatory during the soft launch).
- If available, at least 5 telephone calls and 2 face-to-face visits to the stable contact(s) (if living in the area). If the stable contact address was not within the area, interviewers sent a stable contact tracing letter, which included a standard tracing letter for them to pass on to the cohort member. The tracing letter was also used if the stable contact was reluctant to pass on a new address.

6.3.6 Fieldwork quality control

The fieldwork project manager in conjunction with the research team carried out regular in-office quality checks on work completed by the interviewers. These checks included:

- Adherence to call pattern protocol
- Mode of initial contact
- Response rate by interviewer
- Timing before 9am / after 9pm
- Interview length
- Refusal and non-completion rates: Cognitive assessment
- Refusal rate: Saliva
- Refusal rate: National Insurance Number
- Refusal rate: Data linkage
- Refusal rate: Stable contact information
- Refusal rate: Self completion
- Interviewer administered self-completion

The fieldwork performance team was responsible for addressing any concerns identified with the individual interviewer. Coaching teams assisted via individual or group calls addressing general or specific concerns pertaining to the data collection. The regional coordinators were informed of any concerns. More serious matters and or/complaints were addressed by the regional manager.

An independent Ipsos quality team was responsible for conducting 10% back-checks on completed interviews and would highlight any concerns to the research team to address with the fieldwork team.

6.3.7 Contact attempts

Interviewers were instructed to document all contact attempts in the ECS. Contact attempt included attempts to contact cohort members via telephone, home visits, sending of tracing letters and contacting of stable contacts. Interviewers mostly recorded between 2 and 4 contact attempts before successfully securing an interview with an average of 4.9 contact attempts. The table below provides an overview of the number of contact attempts made to secure an interview. There were 107 cases where no interviewer call attempts were recorded because these individuals completed the online interview during the face-to-face interview fieldwork period, before being contacted by the interviewer.

Table 36. Number of contact attempts until successful interview (full completions)

Number of contact attempts	n	%
0	107	6
1	179	10
2	265	15

3	244	13
4	233	13
5	179	10
6	139	8
7	92	5
8	81	4
9	57	3
10	43	2
11	44	2
12	36	2
13	20	1
14	14	1
15	58	4
Total	1,791	100

* Please note this excludes completed mop up cases

6.4 Re-issuing of soft launch cases

Upon the conclusion of the soft launch's face-to-face fieldwork phase, the CLS Cohort Maintenance Team successfully procured updated contact (address) information for 324 soft launch cases through a tracing exercise via NHS Digital. These cases were issued to the soft launch mop up phase with these updated addresses. Cases that did not take part in this phase were subsequently re-issued to the face-to-face fieldwork stages of Waves 1-4. The distribution of these cases into the first, second, or third wave was determined based on the sample point numbers assigned to their respective addresses.

6.5 Wave 4

The CLS Cohort Maintenance Team continuously follow up with various agencies in an effort to obtain new contact information for cohort members. One of these initiatives involved obtaining contact (address) information for cohort members that were lost to follow up through the NHS Digital databases. This initiative identified addresses for 769 cohort members that were not included in the original issued sample. These cohort members did not participate in the previous two waves of the survey (Sweep 7 and Sweep 8, see Table 18). These cases were only invited to take part online. Making use of an online method was the most cost-effective method aimed at reintroducing the cohort members back into the survey.

Advance materials were tailored for this group and carefully worded to reintroduce cohort members back into the survey. The advance materials consisted of an advance booklet and letter of invitation. These materials were posted to cohort members. One cohort member did have an e-mail address and in addition to the posting out of the materials were e-mailed as well. However, the e-mail address was no longer valid.

6.6 Mop up phase

Cohort members that did not participate during the online or face-to-face fieldwork phases were carefully assessed to consider whether to invite them to participate in the mop up phase. The selection criteria were based on the outcome codes recorded at the previous phases of the fieldwork. Cohort members that provided hard refusals or had passed away or were imprisoned were not selected to participate in the mop up phase of the survey. The mop up phase consisted of online only approach.

The soft launch mop up ran independently from the Waves 1-4 mop up to allow for the mop up experiment discussed in chapter 2 of this report. Based on this experiment it was decided to implement the 20-minute online questionnaire in the Waves 1-4 mop up. Mop up materials were specifically designed to highlight the shortened online questionnaire and incentive amount. The advance materials consisted of a letter of invitation and advance booklet. The reminder strategy consisted of e-mail, text and postal reminders. More information on the reminder strategy can be found in chapter 7 of the technical report.

6.6.1 Overall fieldwork timing

Fieldwork ran between April 2022 and September 2023. The table below summarises the key fieldwork dates per wave:

Table 37. Fieldwork dates

Wave	Activity	Start date	End Date
Soft launch	Online only phase	25/04/2022	15/05/2022
	Face-to-face phase	16/05/2022	28/08/2022
	Mop up phase	05/12/2022	16/01/2023
	Re-issues	20/02/2023	30/07/2023
Wave 1	Online only phase	07/11/2022	27/11/2022
	Face-to-face phase	28/11/2022	02/04/2023
	Mop up phase	04/09/2023	24/09/2023
Wave 2	Online only phase	09/01/2023	29/01/2023
	Face-to-face phase	30/01/2023	04/06/2023
	Mop up phase	04/09/2023	24/09/2023
Wave 3	Online only phase	20/02/2023	12/03/2023
	Face-to-face phase	13/03/2024	30/07/2023
	Mop up phase	04/09/2023	24/09/2023
Wave 4	Online only phase	20/02/2023	30/07/2023
	Mop up phase	04/09/2023	24/09/2023

7 Respondent communication and engagement

7.1 Respondent communication

CLS manage a website for participants which provides news and information about the study: <https://nextstepsstudy.org.uk/>.

In addition to the website, cohort members can access various social media accounts to receive the latest updates on the survey.

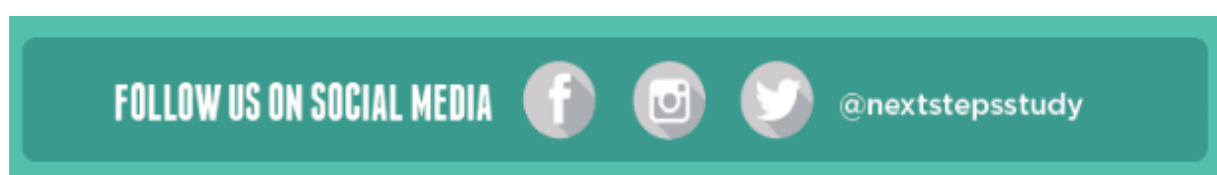


Figure 15 Next Steps on social media

CLS developed a strong brand for the Next Steps survey including the Next Steps logo and a brand toolkit that provided guidelines for the development of all cohort materials. The communication strategy consisted of advance materials that were shared with cohort members at the start of each wave and reminders. In addition, cohort members could contact the Ipsos communications team directly via e-mail, Freepost or freephone with any queries. The CLS Cohort Maintenance Team (CMT) could also be reached via e-mail, Freepost, freephone and social media.

7.2 Pre-survey materials


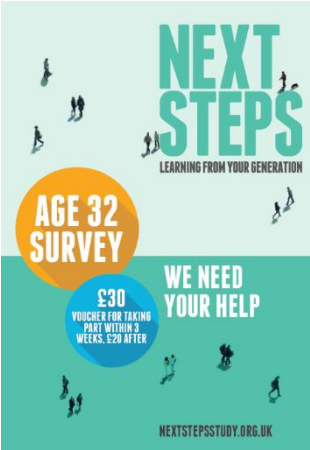
A pre-notification e-mail was sent to all cohort members with a valid e-mail address. In total n=9,234 were sent on 8 October 2021 to inform cohort members about the upcoming survey and to give them the chance to update their contact details.

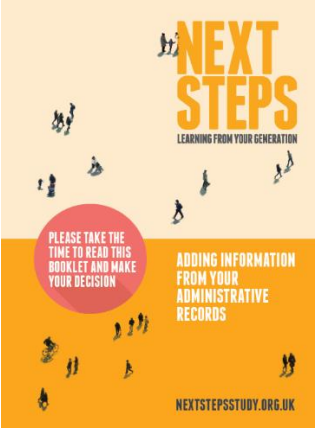
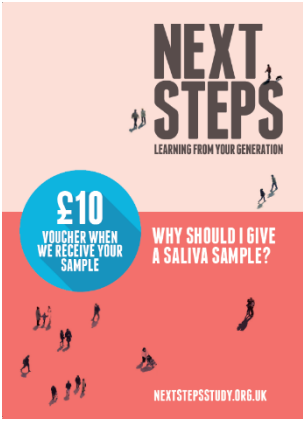
7.3 Advance materials

The aim of the advance materials is to inform cohort members when the study will take place and what taking part in the interview will involve. The materials also provided information about the incentives and that a higher incentive amount was payable if the respondent completed the online survey during the first 3 weeks.

The advance mailing was sent by first class post on the Friday prior to the start of each fieldwork wave (please refer to the below table for the specific dates). This included the advance letter with the weblink to the Sweep 9 survey questionnaire including the respondents unique access code, a booklet about the study, a data linkage

booklet, and a leaflet about the saliva collection request. The purpose of the advance mailing was to provide cohort members with more information about Next Steps, the content of the Sweep 9 survey, and provide details for who to contact for further information. The data linkage leaflet contained detailed information about the purpose and process of data linkage and each data source for which consent will be sought. This leaflet was shared with all respondents including those that have provided consent at Age 25 since it reminded cohort members that their consent from the previous sweep remains valid. The saliva leaflet explained why the study wanted to collect cohort members' DNA for research purposes.

Document type	Title and content
<p data-bbox="309 622 475 651">Advance letter</p> 	<p data-bbox="608 622 887 651">Next Steps Age 32 Survey</p> <p data-bbox="608 701 1031 730">The content of the letters is as follows:</p> <ul data-bbox="647 775 1203 1200" style="list-style-type: none"> • Background of the survey • Details of who is carrying out the survey • What elements are involved in the survey • What happens next, including survey length • Details of the incentive • Data confidentiality and protection information • A link to the privacy policy • How to find out more about the survey • Contact information
<p data-bbox="256 1227 528 1256">Advance survey booklet</p> 	<p data-bbox="608 1227 815 1256">We need your help</p> <p data-bbox="608 1305 1031 1335">The content of the letters is as follows:</p> <ul data-bbox="647 1379 1238 1850" style="list-style-type: none"> • Information on the Next Steps study • Selected research findings from previous sweeps • The purpose of the study • What elements are involved in the survey • Who is carrying out the study • Ethics approval • What happens to the information provided • Data security, confidentiality and privacy • How to find out more about the survey • Who to contact

Document type	Title and content
<p>Data linkage booklet</p> 	<p>Adding information from your administrative records</p> <p>This booklet was intended to provide the cohort members with all the information they needed to understand the purpose, value and process of adding administrative information to their survey responses and to help them make an informed decision about whether to consent to information being added.</p>
<p>Advance saliva leaflet</p> 	<p>Why should I give a saliva sample?</p> <p>The “Why should I give a saliva sample” leaflet provided information about the request for cohort members to provide a saliva sample. The aim of the leaflet was to provide enough information to allow cohort members to provide informed consent at the time of the interview. The leaflet included various resources and well as informing the cohort member of additional resources in the form of Frequently Asked Questions that were available on the website.</p>

Cohort members were requested to take their time to read these materials and were encouraged to contact the study team, free of charge, with any questions they might have. The advance postal mailing was sent out on the Friday before the start of fieldwork of each wave as per the table below:

Table 38. Advance posting dates

Fieldwork wave	Date sent out	Number of postal addresses
Soft launch	22 April 2022	3,206
Wave 1	04 November 2022	3,830
Wave 2	06 January 2023	3,886
Wave 3	17 February 2023	2,152
Wave 4	17 February 2023	769

**Please note that the sample sizes do not align with final sample allocation due to sample shifts between waves that occurred during the fieldwork phase due to address changes and sample point reallocations.*

***Please note that waves 1-4 also included soft launch cases that were reissued*

7.3.1 Advance e-mail

The advance email was sent at 09:00 on the Monday morning at the start of each fieldwork wave. This e-mail provided links to all the advance materials contained in the advance postal mailing including the advance booklets, data linkage booklet and saliva leaflet. The e-mail also contained the direct link to the online survey including the respondents unique access code. The advance e-mails were sent out on the following dates as per the table below:

Table 39. Advance e-mails dates

Fieldwork wave	Date sent out	Number of e-mails
Soft launch	25 April 2022	2,209
Wave 1	07 November 2022	2,469
Wave 2	09 January 2023	2,849
Wave 3	20 February 2023	1,649

**Please note that the sample sizes do not align with final sample allocation due to sample shifts between waves that occurred during the fieldwork phase due to address changes and sample point reallocations.*

***Please note that waves 1-4 also included soft launch cases that were reissued with in that wave.*

****No advance email was sent for Wave 4 since no cohort member in Wave 4 had a valid email address.*

Sending out a postal advance letter as well as an advance e-mail ensured that cohort members that did not have a physical address or cohort members that do not live in England did have access to the online survey link.

7.4 Mop up phase advance materials



The materials for the mop up phase were slightly adjusted to clearly state the reduced questionnaire length, incentive amount and that it would be the final opportunity for cohort members to participate in the survey. Since the mop up survey did not aim to collect data linkage or saliva from cohort members these materials were not included in the mailout.

In addition, a short video clip from the CLS Next Steps study Director was included. The video thanks the cohort members' contribution and summarises the importance of the study and the value of the cohort members' participation in the project. It also emphasised that the mop-up is a shorten 20-minute survey. The video can be viewed here: <https://mediacentral.ucl.ac.uk/Player/4d1Hb4A2>

As discussed in Chapter 4 the impact of the questionnaire length was explored in the soft launch mop-up. Therefore, during the soft launch mop-up two sets of advance mailing and advance posting were sent out.

Respondents selected for the long (60-minute) questionnaire received the same materials as per the original mailing, however respondents that were selected for the short (20-minute) version of the questionnaire received the revised materials as per this section of the technical report. The timings for sending out the advance materials for the mop up phase were as per the below table:

Table 40. Mop up Advance Mailing Dates

Fieldwork wave	Advance post	Physical addresses	Advance e-mail	E-mail addresses
Soft launch	02/12/2022	Long 670 / Short 666	05/12/2022	Long 329 / Short 361
Wave 1	01/09/2023	1,644	04/09/2023	813
Wave 2	01/09/2023	1,680	04/09/2023	893
Wave 3	01/09/2023	824	04/09/2023	455
Wave 4	01/09/2023	728	04/09/2023	1

7.5 Reminders

7.5.1 Online fieldwork reminder strategy

During the three-week online only phase the reminder strategy consisted of e-mail reminders, text reminders and postal reminders on different days (see Table below). Despite some cohort members only having limited contact details available, all cohort members received at least one reminder. Postal reminders were only sent to those without an email address. Number of reminders sent are shown in the table below.

Table 41. Number of reminders sent

Method	Field day	Soft launch		Wave 1		Wave 2		Wave 3	
Total sample		3,113	100%	3,620	100%	4,091	100%	2,266	100%
E-mail reminder	Day 4	1,708	55%	1,978	55%	2,097	51%	1,208	53%
	Day 10	1,341	43%	1,585	44%	1,647	40%	794	35%
Text reminder	Day 7	1,565	50%	1,965	54%	1,925	47%	978	43%
	Day 12	1,264	41%	1,672	46%	1,622	40%	730	32%
Postal reminder	Day 7	976	31%	1,312	36%	1,078	26%	1,225	21%

Text and postal reminders for Wave 3 and Wave 4 were combined as these waves were running concurrently.

In the final email and postal reminder regarding the online fieldwork, participants were informed that if they do not complete the survey online, we will attempt to contact them in person or by telephone. Based on the response rate trend it appears that reminders did positively impact on the overall response rate. The figure below illustrates the days on which the reminders were sent compared to the number of fully completed surveys recorded on that day.

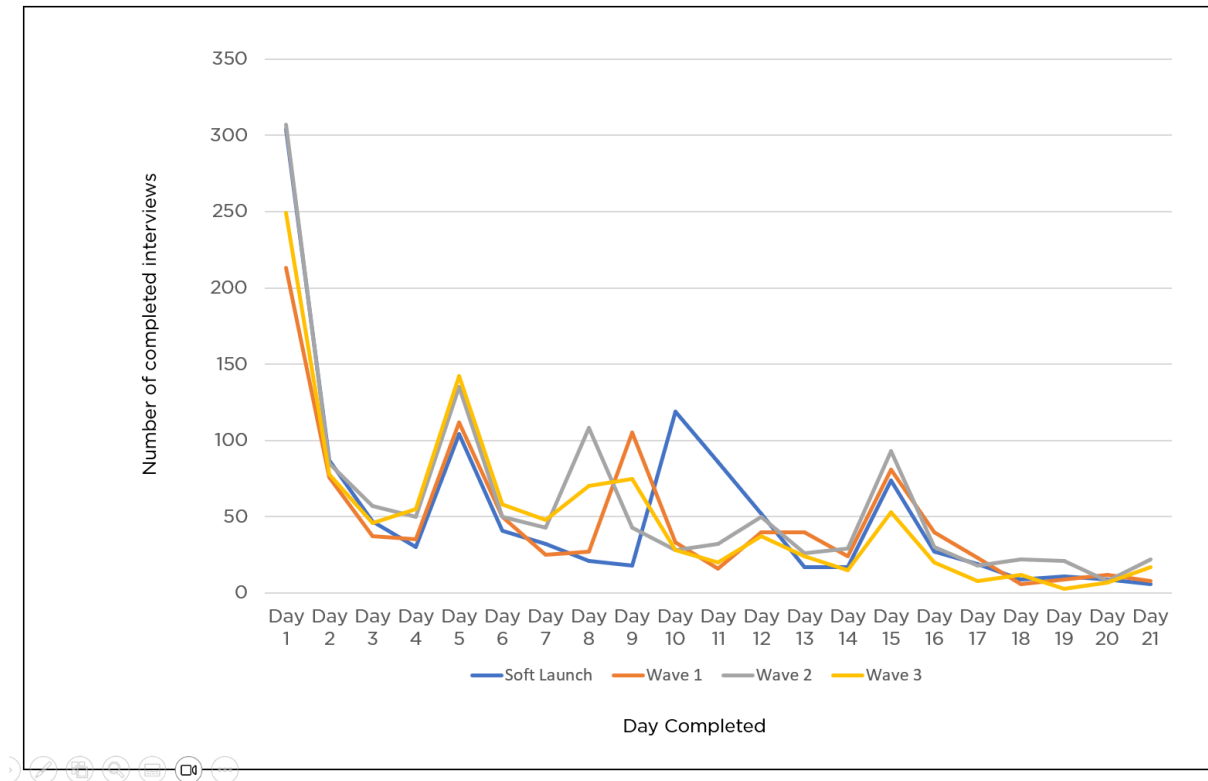


Figure 16 Response rate by reminder sent

7.5.2 Face-to-face fieldwork reminder strategy

During the face-to-face fieldwork period, interviewers were engaging with cohort members directly. E-mail and text messages were shared with cohort members reminding them of appointments, drop off / collection times for secondary devices and Teams invitations. The interviewer instructions specified the wording of these communications with cohort members.

7.5.3 Mop up phase reminder strategy

As previously outlined, the soft launch mop-up phase was run independently to the Waves 1-4 mop up as to assess the effectiveness of the shortened questionnaire, the incentive amount and the reminder strategy. It was decided to keep the reminder strategy consistent from the soft launch mop up to the Waves 1-4 Mop Up.

During the three-week online mop up phase the reminder strategy consisted of the following reminders as per the table below:

Table 42. Mop Up reminder strategy

Method	Reminder day	Soft launch mop up		Wave 1-4 mop up	
		Date	No reminders	Date	No reminders
E-mail reminder	Day 4	09/12/2022	656	08/09/2023	2,104
	Day 10	15/12/2022	610	14/09/2023	1,850
Text reminder	Day 7	12/12/2022	701	11/09/2023	2,175
	Day 10	15/12/2022	672	14/09/2023	2,095
Postal reminder	Day 10	15/12/2022	630	14/09/2023	2,604

**Please note that there were no e-mail addresses or telephone numbers available for Wave 4 cohort members, therefore they could only be sent postal reminders.*

7.6 Breakoff reminders

Breakoff reminders were sent to respondents that started the interview during the online phase but did not reach the end of the survey (regardless of when they broke off) . An online breakoff reminder was e-mailed to cohort members after 24-hours of the cohort member starting the interview but not reaching the end of the interview. Sixteen percent of cohort members who partially completed and were sent a break-off reminder went on to complete the survey for the soft launch and Wave 1, 17% went on to complete for Wave 2 and 30% of Wave 3 cohort members that received the reminder went on to complete the survey.

A breakoff reminder text was sent to cohort members 48 hours after they started the interview but didn't completely finish it. Based on the timing of completion it can be suggested that the second reminder yielded slightly higher completion rates amongst the soft launch (25%), Wave 1 (19%) and Wave 2 (24%) cohort members, whilst only a 19% completion rate for Wave 3 respondents. Overall 37% of cohort members that received a reminder completed the survey in full as per the below table.

Table 43. Number of 24-hour breakoff reminders

	Soft launch		Wave 1		Wave 2		Wave 3		Total	
Sent breakoff reminder 24-hour (e-mail)	156		146		183		155		640	
Completed (Of those that were sent 24-hour reminder)	25	16%	24	16%	32	17%	46	30%	127	20%
Sent breakoff reminder 48-hour (text)	123		118		144		112		497	
Completed (Of those that were sent 48-hour reminder)	31	25%	22	19%	34	24%	21	19%	108	21%
Total break off reminder sent	279		264		327		267		1137	

Total completes (Of those that were sent reminders)	56	20%	46	17%	66	20%	67	25%	235	21%
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* Completed after reminder calculated on those cohort members that completed the survey up to 5 days after receipt of the reminder.

** W4 cohort members did not have email addresses or telephone numbers, they were not sent any breakoff reminders.

During the soft launch and the Wave 1-3 mop up phase of the study, the partial completion numbers were low and overall only 17 reminders were sent.

7.7 Saliva reminders

The reminder strategy for saliva sample returns consisted of an e-mail reminder after day 14 of questionnaire completion, followed by a text reminder after day 21 of questionnaire completion (where contact details were available) to remind cohort members to post their sample to the laboratory. The below table provides an overview of the number of e-mail and text reminders shared with cohort members.

Table 44. Saliva reminders

Incentive	Soft launch	Wave 1	Wave 2	Wave 3	Wave 4
E-mail Reminder	614	658	806	583	23
Text Reminder	482	504	627	447	2
Total	1,096	1,162	1,433	1,030	25

7.8 Thank you letter and incentives

Cohort members who completed the interview in full received a voucher redeemable at a variety of online stores or that can be donated to a charity. Information about how to redeem the voucher was sent in a thank-you letter which was sent either by post or email (as requested by the cohort member).

During the soft launch phase of the survey an incentive experiment was implemented to establish the optimal incentive amount payable to cohort members. Findings from this experiment can be found in Chapter 4. For waves 1-4 a set amount was allocated to the early incentive (£30) payable to cohort members that completed during the online phase or the late incentive (£20) payable to cohort members that completed the survey during the face-to-face fieldwork.

Cohort members received their incentive within 30-days after the completion of their interview and could request to receive their incentive via e-mail or post. The table below summarises the number of early and late incentives paid out. A total number of 6982 incentives were paid out. Two cohort members who could not complete the survey in full due to technical difficulties were also allocated an incentive.

Table 45. Incentive payouts

Incentive	Soft launch	Wave 1	Wave 2	Wave 3	Wave 4	Total
Early incentive	1,130	1,132	1,451	970	36	4,719
Late incentive	597	591	686	357	32	2,263
Total	1,727	1,723	2,137	1,327	68	6,982

**Even though the thank you letter did state the expiry date, several cohort members missed the date and contacted Ipsos post the expiry date. New incentives were issued to these cohort members.*

The majority of incentives were sent via e-mail (81%) versus 19% of cohort members requested their incentives to be posted to them.

As noted earlier the thank you letter also provided a summary of the data linkage consents provided and information about how to change permissions given (see Appendix).

7.9 Saliva thank you notes and incentives

The Bristol lab notified Ipsos once a saliva kit was received for a cohort member. The Ipsos team then actioned a thank you note and incentive. The incentive amount for returned saliva kits during the soft launch was £5. This amount was increased to £10 for waves 1-4. The below table provides an overview of the number of incentives shared by wave.

Table 46. Saliva incentive payouts

Incentive	Soft launch	Wave 1	Wave 2	Wave 3	Wave 4	Total
E-mail	279	326	477	321	6	1,409
Post	49	98	99	80	0	326
Total	328	424	576	401	6	1,735

7.10 Queries and complaints

An important part of cohort maintenance is addressing respondent queries or complaints as soon as possible. For this reason, the CLS Cohort Maintenance Team (CMT) in collaboration with the Ipsos Respondent Communications team implemented a joint communication initiative to address cohort members' needs quickly and effectively. Cohort members could reach out to either CLS or Ipsos to voice concerns and/or to ask questions. The contact details were provided in all the materials.

Processes were put in place between CLS CMT and the Ipsos respondent communications team to ensure that all information was shared securely and in accordance with GDPR regulations. All queries and concerns were

dealt with swiftly and accurately as to help ensure the cohort member's continuous engagement in the project and to respect their right under the GDPR.

8 Response rates

8.1 Overall response rate

The target response rate for the Age 32 survey was at least 54%. The original issue sample size consisted of n=13,090 cohort members, which increased to 13,859 after a decision to issue 769 more cases as Wave 4. In calculating the response rates we have included in the numerator cohort members that either fully or partially completed an interview. Partial interviews consisted of interviews where the cohort member completed the household relationship module of the survey but did not reach the end of the survey.

A total of 7,101 full or partial interviews were completed with participants living in England. A further 181 interviews were achieved with those living outside of England giving an overall total of 7,284.

As those living outside of England are not formally part of the Next Steps target population, we first treat all those outside of England (whether productive or unproductive) as ineligible when calculating the response rate. The overall response rate, excluding all ineligible cases including those who have died or were in prison was 53%. In Table 47 below we also present a second response rate which includes emigrants as eligible. This was also 53%. Those living outside of England were only able to complete the survey online. No interviewer contact was attempted with participants outside of England.

In terms of response rates by wave, Wave 3 achieved the highest overall response rate. This can be attributed to the fact that cohort members in Wave 3 were more likely to have participated in the previous data collection sweep at age 25 and had more up-to-date contact information available. The following table provides a summary of the response rates:

Table 47. Overall response rate

Outcome	Soft launch	Wave 1	Wave 2	Wave 3	Wave 4	Total
Issued sample	3,113	3,620	4,091	2,266	769	13,859
Eligible sample – (excluding deceased, in-prison and emigrants)	3,046	3,529	3,802	2,208	769	13,354
Eligible sample including emigrants	3,100	3,609	4,079	2,263	769	13,820
Fully complete	1,725	1,715	2,126	1,313	68	6,947
Online only phase	1,130	1,123	1,441	972	40	4,706
Face-to-face phase	447	516	551	277	n/a	1,791
Mop up phase	148	76	134	64	28	450
Partial complete	75	85	110	60	7	337
Online only phase	0	1	10	1	5	17
Face-to-face phase	55	78	92	57	n/a	282
Mop up phase	20	6	8	2	2	38

Total full and partial completes (inc. emigrants)	1,800	1,800	2,236	1,373	75	7,284
<i>In England</i>	1,782	1,783	2,104	1,357	75	7,101
<i>Outside of England</i>	18	17	132	16	0	183
Response rate 1 (excluding emigrants as ineligible)	59%	51%	55%	61%	10%	53%
Response rate 2 (including emigrants as eligible)	58%	50%	55%	61%	10%	53%

* Please note that the response rates include fully completed as well as partially completed interviews.

** Please note that the response rates in this table exclude ineligible cases.

*** Please note that 5 cohort members that partially completed the survey requested their data to be permanently deleted, they are coded as refusal in the outcome code tables. For the purposes of this table, these cases were included as partial completes.

Table 48. Breakdown of the total response rate – percentage

	Soft launch	Wave 1	Wave 2	Wave 3	Wave 4	Total
Eligible sample – (excluding deceased, in-prison and emigrants)	100%	100%	100%	100%	100%	100%
Fully complete	56%	48%	53%	59%	9%	51%
Online only phase	37%	32%	35%	44%	5%	34%
Face-to-face phase	15%	15%	14%	12%	n/a	13%
Mop up phase	5%	2%	4%	3%	4%	3%
Partial complete	2%	2%	2%	3%	1%	2%
Online only phase	0%	0%	0%	0%	1%	0%
Face-to-face phase	2%	2%	2%	2%	n/a	2%
Mop up phase	1%	0%	0%	0%	0%	0%
Response rate 1	59%	51%	55%	61%	10%	53%

8.1.1 Final outcomes

The table on the next page provides an in-depth look at completion rates and the reasons for non-response.

Productive cases consist of fully and partially completed interviews (54% of the total sample).

The category “Unproductive – Refusal” relates to refusals received in-office by either Ipsos or CLS and refusals recorded by the interviewers (16% of the total sample).

The category “Unproductive – Other” encompasses cases where there was an interaction between the interviewer and the cohort member, but this interaction did not result in a productive interview (5% of the total sample).

The category “Ineligible” refers to cases where the cohort member has been confirmed to be living outside of the study area during the face to face fieldwork and did not take part, passed away or is currently in prison (2% of the total sample). Please note that this eligibility criterion is different to one used in Table 49 and Table 50, and is aimed at providing a picture of fieldwork outcome codes rather than response rates.

Lastly the category “Uncertain eligibility” pertains to instances in which the interviewer team encountered difficulty in determining the current residence status of the cohort member based on the provided address or could not manage to make contact with the cohort member (24% of the total sample).

Table 49. Final outcome code by wave

Wave	Soft launch		Wave 1		Wave 2		Wave 3		Wave 4		Total	
Issued sample / Total	3,113	100%	3,620	100%	4,091	100%	2,266	100%	769	100%	13,859	100%
Productive	1,795	58%	1,800	50%	2,236	55%	1,373	61%	75	10%	7,279	53%
Full completes	1,725	55%	1,715	47%	2,126	52%	1,313	58%	68	9%	6,947	50%
Partial completes	70	2%	85	2%	110	3%	60	3%	7	1%	332	2%
Unproductive – Refusal	594	19%	660	18%	648	16%	382	17%	2	0%	2,286	16%
Refusal to office	57	2%	65	2%	52	1%	39	2%	0	0%	213	2%
Refusal to interviewer	342	11%	385	11%	354	9%	183	8%	2	0%	1,266	9%
Agree to online, refusal to interviewer	124	4%	106	3%	139	3%	104	5%	0	0%	473	3%
Broken appointment no re-contact	25	1%	61	2%	52	1%	24	1%	0	0%	162	1%
Refusal by proxy / another person	36	1%	28	1%	40	1%	19	1%	0	0%	123	1%
Household refusal	10	0%	15	0%	11	0%	13	1%	0	0%	49	0%
Unproductive – Other category	85	3%	303	8%	242	6%	61	3%	0	0%	691	5%
Contact made – no appointment	73	2%	275	8%	229	6%	53	2%	0	0%	630	5%
Unavailable – away / hospital or ill	8	0%	24	1%	13	0%	6	0%	0	0%	51	0%
Language difficulties	4	0%	1	0%	-	0%	2	0%	0	0%	7	0%
Other	0	0%	3	0%	-	0%	-	0%	0	0%	3	0%
Ineligible	49	2%	74	2%	157	4%	42	2%	0	0%	322	2%
Cohort member died	4	0%	4	0%	4	0%	1	0%	0	0%	13	0%
Cohort member moved abroad	36	1%	63	2%	145	4%	39	2%	0	0%	283	2%
Cohort member prison	9	0%	7	0%	8	0%	2	0%	0	0%	26	0%
Uncertain eligibility	590	19%	783	22%	808	20%	408	18%	692	90%	3,281	24%
No contact with anyone	52	2%	59	2%	105	3%	50	2%	0	0%	266	2%
Cohort member untraced	201	6%	65	2%	101	2%	46	2%	0	0%	413	3%
Traced mover not attempted	21	1%	-	0%	27	1%	8	0%	0	0%	56	0%
Address not located / inaccessible	10	0%	2	0%	5	0%	13	1%	0	0%	30	0%
Untraced mover – CLS	303	10%	629	17%	551	13%	257	11%	0	0%	1,740	13%
No response (Wave 4 only)	0	0%	0	0%	0	0%	0	0%	692	90%	692	5%
Interviewer issue	3	0%	28	1%	19	0%	34	2%	0	0%	84	1%

* Please note that 5 cohort members that partially completed the survey requested their data to be permanently deleted, they are coded as refusal in this table.

Table 50. Final outcome code of cases issued to Face-to-face phase

Wave	Soft launch		Wave 1		Wave 2		Wave 3		Total	
Issued to face to face	1,983	100%	2,485	100%	2,562	100%	1,281	100%	8,311	100%
Productive	665	34%	676	27%	784	31%	398	31%	2,523	30%
Full completes	595	30%	592	24%	684	27%	339	26%	2,210	27%
Partial completes	70	4%	84	3%	100	4%	59	5%	313	4%
Unproductive – Refusal	594	30%	650	26%	647	25%	373	29%	2,264	27%
Refusal to office	57	3%	58	2%	52	2%	35	3%	202	2%
Refusal to interviewer	342	17%	382	15%	353	14%	178	14%	1,255	15%
Agree to online, refusal to interviewer	124	6%	106	4%	139	5%	104	8%	473	6%
Broken appointment no re-contact	25	1%	61	2%	52	2%	24	2%	162	2%
Refusal by proxy / another person	36	2%	28	1%	40	2%	19	1%	123	1%
Household refusal	10	1%	15	1%	11	0%	13	1%	49	1%
Unproductive – Other category	85	4%	303	12%	241	9%	61	5%	690	8%
Contact made – no appointment	73	4%	275	11%	229	9%	53	4%	630	8%
Unavailable – away / hospital or ill	8	0%	24	1%	12	0%	6	0%	50	1%
Language difficulties	4	0%	1	0%	0	0%	2	0%	7	0%
Other	0	0%	3	0%	0	0%	0	0%	3	0%
Ineligible	49	2%	73	3%	87	3%	42	3%	251	3%
Cohort member died	4	0%	3	0%	3	0%	1	0%	11	0%
Cohort member moved abroad	36	2%	63	3%	76	3%	39	3%	214	3%
Cohort member prison	9	0%	7	0%	8	0%	2	0%	26	0%
Uncertain eligibility	590	30%	783	32%	803	31%	407	32%	2,583	31%
No contact with anyone	52	3%	59	2%	100	4%	50	4%	261	3%
Cohort member untraced	201	10%	65	3%	101	4%	46	4%	413	5%
Traced mover not attempted	21	1%	0	0%	27	1%	7	1%	55	1%
Address not located / inaccessible	10	1%	2	0%	5	0%	13	1%	30	0%
Untraced mover – CLS	303	15%	629	25%	551	22%	257	20%	1,740	21%
interviewer issue	3	0%	28	1%	19	1%	34	3%	84	1%

**Because this table is based on the final outcomes of cases that were issued to face-to-face, it also includes mop-up productives (so long as they were issued to face-to-face).*

8.1.2 Completion rates by mode

The majority of cohort members completed the interview online across all waves (85% of all fully completed interviews). Only 8 Teams interviews were fully completed (<1% of all fully completed interviews). Secondary device interviews accounted for 2% of the completed interviews – it’s worth noting that not all interviewers were able to offer this. The following table presents an overview of the method used to complete the interviews by wave.

Table 51. Overall completion rates by mode

Outcome	Soft launch		Wave 1		Wave 2		Wave 3		Wave 4		Total	
Issued sample	3,113		3,620		4,091		2,266		769		13,859	
Full Completes	1,725	100%	1,715	100%	2,126	100%	1,313	100%	68	100%	6,947	100%
Online	1,458	84%	1,404	82%	1,831	86%	1,176	89%	68	100%	5,937	85%
In-home	182	11%	233	14%	205	10%	89	8%	n/a	n/a	709	11%
Secondary device	55	3%	34	2%	47	2%	23	2%	n/a	n/a	159	2%
Teams	3	<1%	4	<1%	1	<1%	0	0%	n/a	n/a	8	<1%
Telephone	27	2%	40	2%	42	2%	25	2%	n/a	n/a	134	2%
Partial completes	75	100%	85	100%	110	100%	60	100%	7	100%	337	100%
Online	69	92%	73	86%	101	92%	56	93%	7	100%	306	91%
In-home	1	1%	7	8%	3	3%	2	3%	n/a	n/a	13	4%
Secondary device	2	3%	4	5%	4	4%	2	3%	n/a	n/a	12	4%
Teams	0	0%	1	1%	0	0%	0	0%	n/a	n/a	1	0%
Telephone	3	4%	0	0%	2	2%	0	0%	n/a	n/a	5	1%

8.1.3 Completion rate by phase

Table 52 shows the response breakdown by phase and mode. It is worth noting that during the face-to-face interviewing phase, a lot of the completed interviews were completed online. Overall, the completion rate in the online phase was 34% (not shown in tables, numerator from Table 52 and denominator from Table 51). In the face-to-face phase the completion rate was 25% (not shown in tables, numerator from Table 52 and denominator from Table 50). In the final phase, the mop up, completion rate was 8% (Table 53).

Table 52. Final response breakdown by phase and mode

Outcome	Soft launch		Wave 1		Wave 2		Wave 3		Wave 4		Total	
Total full completes	1,725		1,715		2,126		1,313		68		6,947	
Online only phase												
Online	1,130	66%	1,123	65%	1,441	68%	972	74%	40	59%	4,706	68%
Face-to-face fieldwork phase												
Total	447	26%	516	30%	551	26%	277	21%	0	0%	1791	26%
Online	186	11%	205	12%	256	12%	140	11%	n/a	n/a	787	11%
Secondary device	49	3%	34	2%	47	2%	23	2%	n/a	n/a	153	2%
Teams	3	0%	4	0%	1	0%	0	0%	n/a	n/a	8	0%
In-home	182	11%	233	14%	205	10%	89	7%	n/a	n/a	709	10%
Telephone	27	2%	40	2%	42	2%	25	2%	n/a	n/a	134	2%
Mop up phase												
Total	148	9%	76	4%	134	6%	64	5%	28	41%	450	6%
60-mins	59	3%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	59	1%
20-mins	89	5%	76	4%	134	6%	64	5%	28	41%	391	6%

Table 52. Final response breakdown by phase and mode (continued)

Outcome	Soft launch		Wave 1		Wave 2		Wave 3		Wave 4		Total	
Total partial completes	75		85		110		60		7		337	
Online only phase												
Online	0	0%	1	1%	10	9%	1	2%	5	71%	17	5%
Face-to-face fieldwork phase												
Total	55	73%	78	92%	92	84%	57	95%	0	0%	282	84%
Online	49	65%	66	78%	83	75%	53	88%	n/a	n/a	251	74%
Secondary device	2	3%	4	5%	4	4%	2	3%	n/a	n/a	12	4%
Teams	0	0%	1	1%	0	0%	0	0%	n/a	n/a	1	0%
In-home	1	1%	7	8%	3	3%	2	3%	n/a	n/a	13	4%
Telephone	3	4%	0	0%	2	2%	0	0%	n/a	n/a	5	1%
Mop up phase												
Total	20	27%	6	7%	8	7%	2	3%	2	29%	38	11%
60-mins	14	19%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	14	4%
20-mins	6	8%	6	7%	8	7%	2	3%	2	29%	24	7%

The response rate for the mop-up phase was 7%, with 6% of the cases fully completing the survey (Table 53). The soft launch wave had the highest completion rate during the mop-up phase. New addresses were obtained through NHS Digital before the soft launch mop up stage. The higher completion rate for soft launch mop up could be because it was the first contact about the Age 32 survey for those cohort members with an updated address. Whereas, for Wave 1 to Wave 3 cohort members, the updated addresses were obtained before the online only phase, hence all possible modes were exhausted with those cohort members when they reached the mop up phase.

Table 53. Mop up completion rate

	Soft launch		Wave 1-4		Total	
Sample	3,113	100%	10,751	100%	13,859	100%
Issued	1,337	43%	4,887	45%	6,224	45%
20-minute	89	7%	302	3%	391	6%
60-minute	59	4%				
Partials	20	1%	18	0%	38	1%
Total	168	13%	320	3%	488	8%

* Please note completion rate calculated on number of cases issued.

8.1.4 Outcome code by Age 25 outcome

The following table presents a summary of the Sweep 9 outcome code based on the Age 25 outcome. It shows that 73% of cases that were productive in the previous sweep were productive in Sweep 9. However, 13% of cases that took part at Age 25 refused to participate in this sweep. Among the cases that previously refused, 28% chose to participate in this sweep. 32% of cases that were previously untraced were interviewed at Sweep 9.

Table 54. Sweep 9 outcome by Age 25 outcome

Outcome	Productive at Sweep 8		Refusal at Sweep 8		Other unproductive at Sweep 8		Ineligible at Sweep 8		Untraced at Sweep 8		No Contact at Sweep 8		Total
Issued sample	7,624	58%	2,098	16%	465	3%	216	2%	2,273	12%	1,183	8%	13,859
Productive at Sweep 9	5,576	73%	577	28%	133	29%	66	31%	582	26%	345	29%	7,279
Full completes	5,365	70%	529	25%	123	26%	64	30%	547	24%	319	27%	6,947
Partial completes	211	3%	48	2%	10	2%	2	1%	35	2%	26	2%	332
Unproductive – Refusal	926	12%	648	31%	101	22%	27	13%	336	15%	248	21%	2,286
Refusal to office	87	1%	70	3%	10	2%	2	1%	24	1%	20	2%	213
Refusal to interviewer	482	6%	389	19%	57	12%	15	7%	185	8%	138	12%	1,266
Agree to online, refusal to interviewer	215	3%	104	5%	16	3%	6	3%	80	4%	52	4%	473
Broken appointment no re-contact	72	1%	40	2%	4	1%	2	1%	29	1%	15	1%	162
Refusal by proxy / another person	48	1%	34	2%	12	3%	0	0%	11	0%	18	2%	123
Household refusal	22	0.3%	11	1%	2	0%	2	1%	7	0%	5	0%	49
Unproductive – Other	20	0%	13	1%	3	1%	5	2%	11	0%	9	1%	61
Unavailable – ill/mental health issues	239	3%	169	8%	44	9%	15	7%	82	4%	81	7%	630
Contact made – no appointment	17	0%	12	1%	3	1%	4	2%	9	0%	6	1%	51
Language difficulties	3	0%	1	0%	0	0%	1	0%	1	0%	1	0%	7
Other reasons	0	0%	0	0%	0	0%	0	0%	1	0%	2	0%	3
Ineligible	119	2%	47	2%	12	3%	28	13%	75	3%	41	3%	322
Cohort member died	7	0%	2	0%	2	0%	0	0%	1	0%	1	0%	13
Cohort member moved abroad	109	1%	42	2%	9	2%	24	11%	63	3%	36	3%	283
Cohort member in prison	3	0%	3	0%	1	0%	4	2%	11	0%	4	0%	26
Uncertain eligibility	744	10%	644	31%	172	37%	75	35%	1,187	52%	459	39%	3,281
No contact with anyone	92	1%	54	3%	17	4%	9	4%	50	2%	44	4%	266
Cohort member untraced	95	1%	96	5%	33	7%	8	4%	119	5%	62	5%	413
Traced mover not attempted - outside area	21	0%	10	0%	1	0%	1	0%	14	1%	9	1%	56
Address not located / inaccessible	5	0%	12	1%	1	0%	1	0%	7	0%	4	0%	30
Untraced mover - CLS	493	6%	458	22%	107	23%	36	17%	390	17%	256	22%	1,740
No Contact	0	0%	0	0%	5	1%	17	8%	589	26%	81	7%	692
Interviewer issue	38	0%	14	1%	8	2%	3	1%	18	1%	3	0%	84

8.2 Wave 4 completion rate – NHS traced cases

Wave 4 cases were not initially issued at the beginning of the survey but were traced and subsequently issued as Wave 4. These cohort members were only invited to participate in the online phase and the online mop-up phase, but they were not allocated to the face-to-face phase (i.e. were not issued to an interviewer). The overall completion rate for these cases was 10%. Referring to Chapter 3, it can be observed that none of these cases had not participated in the previous two sweeps of the survey. Considering this, the results are relatively favourable.

Table 55. Wave 4 completion rate

Issued sample	n=769	6%
Full Complete	68	9%
Online only phase	40	5%
Face-to-face fieldwork phase	n/a	n/a
Mop up phase	28	4%
Partial	n=7	1%
Online only phase	5	0%
Face-to-face fieldwork phase	n/a	n/a
Mop up phase	2	<1%
Response rate	n=75	10%

8.3 Reissued soft launch cases' completion rates

A total of n=324 soft launch cases were reissued during the Wave 2 and Wave 3 fieldwork. These cases are selected for reissue as new addresses for them were found using NHS Digital by CLS, and these new addresses could only be issued at the soft launch mop-up phase, therefore they wouldn't have received visits to their updated addresses to this point. Among these reissued cases, n=39 (13%) fully completed the survey, and n=13 (4%) partially completed the survey, resulting in an overall completion rate of 28%. The majority of cases (45%) still remained untraced, while almost a third of cohort members refused to participate (29%).

Table 56. Outcome codes for the soft launch reissued cases

Re-issued	Outcome	
Issued sample / Total	324	100%
Productive	54	17%
Full completes	39	12%
Partial completes	13	4%
Unproductive - Refusal	92	28%
Refusal to office	2	1%
Refusal to interviewer	41	13%
Agree to online, refusal to interviewer	24	7%
Broken appointment no re-contact	8	2%
Refusal by proxy / another person	10	3%
Household refusal	7	2%
Unproductive - Other	26	8%
Contact made – no appointment	24	7%
Unavailable – away / hospital or ill	1	0%
Language difficulties	1	0%
Ineligible	7	2%
Cohort member moved abroad	3	1%
Cohort member prison	4	1%
Uncertain eligibility	147	45%
No contact with anyone	42	13%
Cohort member untraced	75	23%
Traced mover not attempted	16	5%
Address not located / inaccessible	9	3%
Untraced mover – CLS	2	1%
Interviewer issue	3	1%

8.4 Saliva consent rates

The saliva module is not included in the 20-minutes mop-up questionnaire, and it is only asked to those who live within the UK. Out of those who took part in the full interview and the long mop up survey, 207 cohort members lived outside of the UK, and they are excluded in table 57. In total, 57% of eligible cohort members provided consent for saliva collection. Among those who provided consent, samples of only 48% of them were received by the Bristol lab.

Table 57. Saliva consent and returns rates by method

Method	Eligible for saliva consent		Saliva consent given		Sample received	
	n	n	Out of eligible (%)	n	Out of consents (%)	Out of eligible (%)
Online	5,326	3,091	58%	1,482	48%	28%
Secondary devices	150	55	37%	11	20%	7%
In-home	674	371	55%	227	61%	34%
Teams	8	5	63%	-	0%	0%
Telephone	134	45	34%	9	20%	7%
Mop up (60 min)	57	24	42%	6	25%	11%
Total	6,349	3,591	57%	1,735	48%	27%

* An additional 22 samples were received at Bristol lab. Due to the labelling being damaged these samples could not be traced back to cohort members.

8.4.1 Reasons for not providing saliva consent

Cohort members who did not want to provide saliva consent were asked a follow-up question about their reasons for not providing consent. Most of the cohort members (49%) did not provide a reason, or a specific reason. The top three main reasons for not providing consent were that cohort members did not feel comfortable providing a saliva sample (13%), some felt that it was invasive to ask for a saliva sample (5%) and some felt unsure about their DNA being stored/shared for research.

Table 58. Reasons for not providing saliva consent

Coded Verbatim	Count	Percentage
Uncomfortable / unsure / feel weird about providing saliva or DNA sample	353	13%
Intrusive / invasive	136	5%
Don't want / unsure about DNA being stored or shared for research	103	4%
Doesn't see the relevance / meaningful contribution / feel unnecessary	88	3%
Lack of trust	80	3%
Protection of privacy / privacy concern	73	3%
Already have too much of data / This is too much	64	2%
Need more information on how it will be used	64	2%
Don't have time / Too much hassle	63	2%
Not interested	47	2%
Too personal	59	2%

Prefer not to / Personal choice	33	1%
Worried about data breaches / what it might be used in the future	24	1%
Incentive amount is too low	21	1%
Moved / Staying abroad	19	1%
Wish it would have feedback back to me / want to know the results	18	1%
Protection of personal data	17	1%
Not comfortable / feeling unsafe about storing DNA overseas	13	<1%
Ethical concerns	5	<1%
Don't want my DNA and personal information to be collected together	5	<1%
Unexpected request	3	<1%
Other	82	3%
Don't know	10	<1%
No reason / Prefer not to say / No answer / Don't want to or agree	1339	49%
Total	2719	100%

8.5 Cognitive assessment completion rates

The overall completion rate for cognitive assessment (CA) was 78%. The table below indicates the variation in CA completion rates by modes. For the modes that were administrated with the CAPI script (in-home and telephone), if the cohort member/interviewer decided to exit the task early by clicking the 'exit task' button this was recorded within the partial data (CA Partial completes). During fieldwork it was discovered that if the cohort member/interviewer terminated the task by clicking on the 'x' in the corner of the screen, that this would be recorded as 'no data' as data were not retained. If the CA software failed to launch following from the CAPI script, it would also be recorded as "no data" (n=78, not shown in Table 59, part of CA no data cases in in-home and telephone interviews). In the online mode, all data is retained if the participant exits early therefore 'no data' is not possible.

Table 59. CA completion rates by modes

Mode	Full completes	CA full completes		CA partial completes		CA no data	
Online	5,493	4,364	79%	1,128	21%	0	0%
Secondary devices	153	117	76%	36	24%	0	0%
In-home	709	515	73%	0	0%	178	25%
Teams	8	7	88%	1	13%	0	0%
Telephone	134	76	57%	0	0%	58	43%
Mop up (60 min)	59	46	78%	13	22%	0	0%
Total	6,556	5,125	78%	1,178	18%	236	4%

*Please note that 16 in-home cohort members refused to complete the self-completion section which includes the CA.

**Please note one person experienced a technical problem during completion of the survey and they were manually set as fully complete. However, we do not have CA data for this cohort member.

A follow-up question was asked to interviewers who didn't have data for the cognitive assessment. All these cases come from either in-home interviewing or from the telephone mode. The table below indicates the reasons as specified.

Table 60. Reason for not completing the cognitive assessment (in-home and telephone)

Reason for no data	n	%
Google Chrome not installed	3	1%
Exercise refused by participant – proceed with interview	50	21%
Exercise did not launch (e.g. has not been installed) – proceed with interview	78	33%
Other/unknown reason – proceed with interview	105	44%
Total	236	100%

The research team frequently followed up with interviewers to ensure that the correct software has been installed as to prevent any further technical problems.

8.6 Completion rates for the self-completion section

The self-completion section consisted of very sensitive information and cohort members had the right to refuse completing this section in in-home and Teams interviews. In total only 44 cohort members (1% of fully completed interviews) refused to complete this section. The following table includes those who have fully completed the interview, excluding the 20-minutes mop-up completions.

Table 61. Self-completion completion rates

Mode	Self-completion full completes		Self-completion refused	
	n	%	n	%
Online	5,493	100%	0	0%
Secondary devices	153	100%	0	0%
In-home	692	98%	17	2%
Teams	8	100%	0	0%
Telephone	134	100%	0	0%
Mop up (60 min)	59	100%	0	0%
Total	6,539	100%	17	<1%

**Whenever the online script was used (online surveys, secondary devices, or the long mop-up (60 minutes) skipping CASI as an entire section was not an option, as the entire survey was self-administered. Similarly, in telephone interviews, the interviewer carried out the CASI section like other sections, without an option to skip it entirely. Therefore, there are 0 cases under CASI refusal for these modes.*

When the interview is completed through Teams or In-home, cohort member had the option to complete the self-completion section with interview assistance. The below table show the rate of interviewer assistance self-completion.

Table 62. Self-completion interviewer assistance rates

	Soft launch		Wave 1		Wave 2		Wave 3		Total	
Teams	3	38%	4	50%	1	13%	0	0%	8	100%
Cohort members self-completed	2	25%	2	25%	0	0%	0	0%	4	50%
interviewer read out	1	13%	2	25%	1	13%	0	0%	4	50%
In-home	180	26%	224	32%	201	29%	87	13%	692	100%
Cohort members self-completed	160	23%	204	29%	185	27%	80	12%	629	91%
Interviewer read out	20	3%	20	3%	16	2%	7	1%	63	9%

8.7 Data linkage consent rates

The consent rates for data linkage were generally high, with more than half (61%) of all eligible cohort members providing at least 1 consent during the Sweep 9 interview. It is noteworthy that respondents were more willing to link to data held at the Department for Education (57%), while they were less inclined to have their results linked to the HM Revenue and Customs (41%). It is important to mention that respondents were more likely to provide consent for data linkage to their administrative records during an in-home interview. On the other hand, respondents were least likely to provide consent for data linkage using secondary devices.

Table 63. Data linkage consent rates

Records kept by	Online			Secondary device			In-home			Teams			Telephone			Total		
	Eligible	n	%	Eligible	n	%	Eligible	n	%	Eligible	n	%	Eligible	n	%	Eligible	n	%
NHS Digital	2,575	1,147	45	95	29	31	410	295	72	5	3	60	85	38	45	3,170	1,512	48
Department for Education	2,343	1,261	54	92	37	40	400	310	78	4	3	75	80	36	45	2,919	1,647	56
Universities and Colleges Admission Services	2,436	1,291	53	95	39	41	412	307	75	4	3	75	81	32	40	3,028	1,672	55
Student Loans Company	2,790	1,420	51	102	39	38	435	314	72	5	3	60	90	37	41	3,422	1,813	53
HM Revenue and Customs	2,914	1,106	38	106	32	30	451	276	61	5	2	40	92	39	42	3,568	1,455	41
Department for Work and Pensions	2,827	1,075	38	106	31	29	440	288	65	5	2	40	91	38	42	3,469	1,434	41
Ministry of Justice	2,599	1,124	43	99	31	31	425	277	65	5	4	80	87	35	40	3,215	1,471	46
NI number provided	1,634	966	59	45	26	58	350	231	66	3	1	33	46	24	52	2,078	1,248	60
Provided at least 1 consent at Sweep 9	3,397	1,969	58	112	51	46	491	387	79	6	4	67	103	52	50	4,109	2,463	60
Provided at least 1 consent at Sweep 9 or Sweep 8	5,548	4,632	83	157	106	68	709	634	89	8	7	88	134	94	70	6,556*	5,473	83

*The number of cohort members who fully completed the full version of the questionnaire.

8.8 Partner data linkage

During the soft launch, the Next Steps study sought to ask cohort members' live-in partners to give permission to link their administrative records. This was the first time that Next Steps sought to contact partners. Contact with partners was only attempted if the cohort member gave permission.

Partners could select one of three modes to complete the data linkage module:

- In-home at the time of the interview with the CM
- Teams at the time of the interview with the CM
- Online via a standalone script

For face-to-face in-home interviews, partners who were available were asked if they would take part in person at the time of the CM interview.

Table 64. Partner data linkage consents by mode

	Online	Secondary device	Teams	In-Home	Telephone	Total
Eligible partner identified	825	20	2	90	15	952
% eligible partners - all interviews	63%	41%	67%	55%	60%	61%
Permission given to contact partner (during interview or after interview)	354	9	2	73	8	446
% permission - all with partners	43%	45%	100%	81%	53%	47%
Partner consent survey completed	68	2	0	19	2	91
% survey completion - all partners	8%	10%	0%	21%	13%	10%
% survey completion - permissions given to contact partner	19%	22%	0%	26%	25%	20%
Consents provided						
Health records	67	0	0	18	2	87
% Health records - completed survey	99%	0%	-	95%	100%	96%
% Health records - all partners	8%	0%	0%	20%	13%	9%
HM Revenue and Customs	63	0	0	18	2	83
% HMRC - completed survey	93%	0%	-	95%	100%	91%
% HMRC -all partners	8%	0%	0%	20%	13%	9%
Department for Work and Pensions	65	0	0	18	2	85
% DWP - completed survey	96%	0%	-	95%	100%	93%
% DWP - all partners	8%	0%	0%	20%	13%	9%
NI number provided	60	0	0	17	1	78
% NI number - completed survey	88%	0%	-	89%	50%	86%
% NI number - all partners	7%	0%	0%	19%	7%	8%
All consents provided						
All consents provided	63	0	0	18	2	83
% completed survey	93%	0%	-	95%	100%	91%
% all partners	8%	0%	0%	20%	13%	9%

At least one consent provided	67	0	0	18	2	87
% completed survey	99%	0%	-	95%	100%	96%
% all partners	8%	0%	0%	20%	13%	9%
Consents not provided	758	20	2	72	13	865
% all partners	92%	100%	100%	80%	87%	91%

The below table details consent for partners who were present during in-home interviews:

Table 65. Partner data linkage consents for in-person interviews with partners present

	In-home
Eligible partner identified	90
Where partners were present	21
% all partners from in-home CM interviews	23%
Partners that were at home and agreed to take part	17
% all partners present	81%
Consents provided	
Health records	16
% all partners home and agreed to take part	94%
% all partners present	76%
HM Revenue and Customs	16
% all partners home and agreed to take part	94%
% all partners present	76%
Department for Work and Pensions	16
% all partners home and agreed to take part	94%
% all partners present	76%
NI number provided	16
% of partners consenting to HMRC or DWP	94%
All consents provided	16
% all partners home and agreed to take part	94%
% all partners present	76%
At least one consent provided	16
% all partners home and agreed to take part	94%
% all partners present	76%
No consents provided	5
% all partners present	6%

The table below summarizes the mode in which the cohort members' partners were approached for the data linkage consent survey:

Table 66. Mode of contacting partner – consent by cohort member

	Online		Secondary device		Teams		In-Home		Telephone		Total
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	
Email	306	68%	8	2%	2	0%	52	12%	7	2%	375
Post	48	11%	1	0%	0	0%	4	1%	1	0%	54
Partner available in home & agreed to take part							17	4%			17

Once consent from cohort members was obtained, most respondents preferred for the Partner Data Linkage information packs to be distributed via e-mail (83%).

8.9 Questionnaire breakoff points

Comparing breakoff by mode, most of the drop off occurred in the online survey. 48% of breakoffs occurred during the first module (Household relationship). Within the Household relationship module, many participants left after the introduction (which also included a consent question) or when asked for personal details like date of birth or address. For those who progressed, common breakoff points included the cognitive assessment, gross pay, or personality traits questions.

Table 67. Distribution of breakoff by mode

Mode	Count	Percentage
Online survey	592	89%
Secondary device	33	5%
In-home interview	22	3%
E-showcards	15	2%
Teams interview	6	1%
Total	698	100%

Table 68. Breakoff points by wave and whether they completed the household relationships module

Data breakoff point – Count	SL	W1	W2	W3	W4	Total
Refused at consent question	5	10	7	3	3	27
Started did not reach the end of the household relationship section	62	113	103	49	49	334
Completed household relationship section but did not reach the end of the survey*	75	85	110	60	60	337
Total	142	208	220	112	112	698
Data breakoff point – Percentage	SL	W1	W2	W3	W4	Total
Refused at consent question	4%	5%	3%	3%	13%	4%
Started did not reach the end of the household relationship section	44%	54%	47%	44%	44%	48%
Completed household relationship section but did not reach the end of the survey*	53%	41%	50%	54%	44%	48%
Total	100%	100%	100%	100%	100%	100%

*This group was considered as usable partials, and have previously been included in response tables as productive interviews.

Table 69. Breakoff end question (within the Household relationship module – 10 breakoffs or more)

End variable	End question	Number of breakoffs
INTRO1a or INTRO1ACHK	Introduction screen	134
HBDAT	Date of birth check	44
CCAdd or CCAddOK	Address check	16

*This table only includes questions with breakoff of ten respondents or more.

Table 70. Breakoff question

Completed Household relationship module but did not complete the survey – 10 breakoffs or more

End variable	End question	Number of breakoffs
SELFCOMP.BDS_INTRO_1_inf	Cognitive assessment introduction	41
GROA_block	Gross pay	15
SELFCOMP.BIGA_O	Personality traits	14

*This table only includes questions with breakoff of ten respondents or more.

The next chapter of the technical report will focus on data preparation and delivery.

9 Data preparation and delivery

9.1 Instrument quality

The survey instrument was programmed in IBM SPSS Data Collection (also known as Dimensions) V6.0.1 data collection software. Computer Assisted Interviewing enables a series of checks to be in-built into the questionnaire instrument, controlling the order, appearance and routing presented to the participant, including enforcing questionnaire requirements such as single or multicode options.

Routing specifications also allow for various checks to be implemented throughout the instrument to enhance the quality of the data collected. These specific checks were employed to compare the answers provided with the sample information, identify inconsistencies in recorded dates for related events and enforcing formatting rules when collecting contact information.

These rules and checks were used in conjunction with on-screen guidance and access to help screens, aiming to optimise data quality during the data collection phase and minimising the need for manual editing during the subsequent data processing and analysis stages.

In addition, the instrument was set up to enable write-backs between the script and the ECS, ensuring that sample updates were always correctly displayed or updated accordingly back to CLS.

9.2 Data checks

Ipsos undertook extensive checks on the pilot data, soft launch data and main stage data. Between the pilot and soft launch, a number of questions and routing were amended, and these were tested as standard in-office and again during the soft launch phase once fieldwork had started. Minor edits were implemented between the soft launch and main stage fieldwork, these changes were also tested before fieldwork begun.

The types of checks undertaken during the soft launch were to ensure that the questionnaire was functioning correctly and to identify any potential issues that were not detected during the office testing. These checks included the following:

1. Routing checks which confirmed that the specific routing was reflected in the data.
2. Data breakoffs were reviewed to identify any patterns of cohort members discontinuing the survey at specific questions or using particular mode and/or browser.
3. Interviewer feedback on any in-field issues experienced.

The checks revealed that the script was effectively functioning with the exception of the SOC variables as described in section 5.4 of this technical report.

9.2.1 Missing variable and case

Further checks were undertaken on all variables towards the end of fieldwork, and these identified one variable (REWH – country born in for those born outside the UK) had not been set to store the answers. This variable usually captures a small number of other answers and was missed during earlier checking rounds.

During fieldwork we found one case had completed the interview but due to a technical error their data was completely lost, and we were unable to recover their answers.

9.2.2 CAPI and the hierarchical feedforward data

It was discovered that the CAPI script did not pull through the hierarchical feedforward data as it should have. Throughout the script there were many fail safes in place to account for missing feedforward data therefore the script did flow as intended, however for certain loops the existing feedforward data was not verified. The data loops that were impacted by this included the child grid loop, other household member loop and the pregnancy loop. This meant in some cases biological children recorded in the age 25 survey were asked about from scratch in age 32, and some other household members who were present at the age 25 survey were not verified as intended and only recorded by the participant if they chose to, which may have resulted in a lack of data about them leaving the household.

For the child grid loop 126 cohort members had feedforward data that should have been routed through to verify their existing information but did not. However, after careful examination only 4 cohort members were not followed up correctly and the remaining 122 cohort members had confirmed their data afresh. In terms of the other household member loop 261 cohort members were impacted of which 111 confirmed some information (66 did not confirm for all household members) and 150 cases did not provide any data. In the pregnancy loop the respondent is asked to select the child from a list collected in the household grid section of the “all biological children”, whether they were in the household or not. The script only picked up data on new children that entered the household because of the lack of the feedforward data. A check was run to establish how many times a respondent may have had to select the code “Child not listed” because of this lack of data and it was selected 10 times (10 pregnancies). In those cases, the follow up questions included the name, date of birth and gender of the child. The script also asked PHCHNAMEHERE if the child is living with them, resulting in answers ranging from “Yes, they live with me” to “No but they have lived with me” to “Child has died”. For children that have died the month and year of death were collected. Therefore some information was collected about biological child leavers that would not have been captured in the child grid because of the error. Ipsos believes the impact on the data in this section is low, and this section has added some data that would otherwise be missing due to the error.

The errors mentioned above were checked manually, matching records of new entries to feedforward entries, and flags were added to the data to denote affected cases. This was then cross checked by the team at CLS to agree Ipsos’ approach on a case-by-case basis and the survey data was corrected accordingly.

9.2.3 SOC look up error evaluation

In order to understand the impact of the SOC lookup script error experienced during the soft launch fieldwork, 149 cases that were not affected by the error were selected and reviewed. These selected cases were sent to the office coding team for a new round of coding, the data of the variables that were affected during the script error were not shared with the office coding team to mimic the script error. The original SOC codes were not shared to ensure blind coding.

The new SOC codes from the coding team were then compared with the original SOC codes from the round of coding when all the necessary data were available for the coding team. We found 115 cases (77%) received the same SOC code as per the first round of coding. 7 cases received a SOC code that is where the same as to the previous round of coding at the first

3 digit-level. The remaining 27 (18%) did not match at the 3-digit level. The relatively high levels of agreement suggest that the impact of the missing information on the accuracy of coding was limited.

9.3 Coding

CLS provided an initial codeframe for “other specify” and open-ended questions. Coding was completed by a team of specialised Ipsos coders who were briefed prior to the start of the coding. It was possible for some of the “other specify” statements to be back coded into the existing codeframe. Any newly created codes required approval from CLS. The survey data set includes multiple variables: the original binary variables representing the responses as provided in the interview, a set of variables with only the coded responses, and a final set of binary variables that combine the original and coded variables. Back checking was done on 5% of each coded variable to ensure the overall consistency and quality of the coding.

9.4 Data outputs

The survey data included single and multi-coded questions alongside loops or grids. CLS sent a specification to Ipsos outlining how they wished to receive the survey responses back, including the provision of “flat” data in the main survey dataset and loops or grid items (for example relationship grid of benefit questions) restructured as hierarchical files. The datasets provided included:

1. Respondent level “flat” survey dataset
2. Hierarchical relationship file
3. Hierarchical non-resident parent and non-resident child files
4. Hierarchical child and other household member files
5. Hierarchical activity history, pregnancy history files

9.4.1 Sample Contact Information

Contact information was provided separately to the survey data. The productive contact data was populated using data obtained during the interview. Unproductive contact information was obtained from the most recent contact information obtained during the tracing process.

9.4.2 Paradata

A substantial amount of paradata was collected during fieldwork, from the questionnaire itself but also data collected from the interviewers during their tracing and call attempts.

The data delivered to CLS included the following type of information:

- For each issued case, a record of each time the case was re-issued based on new information received, date of issue and outcome of issue.
- For each issued case, a record of all contacts (letters, emails, texts, phone calls and personal visits) including any contacts made during tracing, e.g. to neighbours and stable contacts. For each contact, the type of contact, who the contact was with, the address or phone number contacted, date, time and outcome of the contact.
- All intermediate addresses found during tracing.
- Refusals reasons if applicable.
- Consents captured.
- Mode, time and date of interview.
- Pseudonymised interviewer ID and characteristics of the interviewer, including, sex, age and experience.
- **Other information which was collected as standard including office and interviewer remarks relevant to the longitudinal processing of the case.** Web-browser data used by the respondent, where applicable, the type of device used by the respondent, the screen and browser dimensions, etc.
- If a voucher was issued, whether it has been redeemed by the respondent.

10 Appendix

10.1 Soc coding missing variables

Herewith a list of the SOC variables where data was not recorded for n=988 cases during the soft launch phase.

- SOCKEY2_new_job_title
- SOCKEY2_new_job_desc
- CJCHECK
- CJDO2
- CJDO_LU
- CJDO_LU_SOC2020
- CJDO_LU_SOC2010
- CJDCHK
- SOCKEY3_new_job_title
- SOCKEY3_new_job_desc
- JDO_LU
- JDO_LU_SOC2020
- JDO_LU_SOC2010
- SOCKEY4_new_job_title
- SOCKEY4_new_job_desc
- PJDO_LU
- PJDO_LU_SOC2020
- PJDO_LU_SOC2010

10.2 Prenotification e-mail



FIELDSERIAL

NEXT STEPS AGE 32 SURVEY

Hi FIRSTNAME,

Back in 2004, you and around 16,000 other young people were specially selected to take part in the first survey of what would become Next Steps. Since then, there have been seven main surveys with study members, to see how your lives have changed. The next survey is happening now, and we really hope that you will take part again. We would love to learn where you are and what you've been doing since we last spoke to you. To thank you for your help, we will send you a voucher (see more information below).

[Take part now](#)

The survey this time around is being carried out by Ipsos (an independent research organisation) on behalf of the Centre for Longitudinal Studies at University College London (UCL), which runs the study.



What would we like you to do?

We would like you to complete a survey about your life now and how things have changed for you over the past few years. We will ask about your family and social life, your housing circumstances, your employment and income, your education, your health and wellbeing. We will also ask for your permission to add information held about you in administrative records, maintained by various government departments and agencies, if you haven't previously given these. If you have a partner and live with them, we will ask their permission to add information about them too. We will also ask if you would be willing to provide a saliva sample for genetic research.

The survey should take around 60 minutes to complete, but it can be slightly quicker or longer depending on your circumstances.

By taking part you are helping us make life better for your generation and the next. It is entirely voluntary, but we hope you will be able to find the time to help us.

Please take time to read the following booklets as they provide full details on what the survey involves:

- [‘WE NEED YOUR HELP’ BOOKLET](#)
- [‘ADDING INFORMATION FROM YOUR ADMINISTRATIVE RECORDS’ BOOKLET](#)
- [‘SALIVA SAMPLE – THINGS TO KNOW’ BOOKLET](#)



What's next?

We'd like you to do the survey online as it's quicker and easier for you, and efficient for us. But if we do not hear from you, we will also try contacting you in person or by telephone. To get started, visit <https://ipsos.uk/NS32> and enter your online password: XXXXX, or just click the button above.



Will the information you give remain confidential?

The information you give will be used for research purposes only and in accordance with the General Data Protection Regulation (GDPR). Your personal details will be kept strictly confidential and separate from the answers you give, so you can't be identified. More detail about privacy and confidentiality is available in the booklet ('We need your help') and on the Next Steps website: nextstepsstudy.org.uk/home/privacy/.



Thank you

To say thank you for your help, we will send you a voucher which can be spent online in a range of stores or can be donated to a charity. Because it's cheaper for us if you do the survey online, we can offer you a £25 voucher. To claim this, you need to complete the online survey within three weeks. After that we will only be able to give you a £15 voucher for taking part.



Any questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on Freephone **0800 1522516**.

Thank you for your help with this important study.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps



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10.3 Advance letter



**NEXT
STEPS**
LEARNING FROM YOUR GENERATION

Reference:

NEXT STEPS AGE 32 SURVEY

Back in 2004, you and around 16,000 other young people were specially selected to take part in the first survey of what would become Next Steps. Since then, there have been seven main surveys with study members, to see how your lives have changed. The next survey is happening now and we really hope that you will take part again. We would love to learn where you are and what you've been doing since we last spoke to you.

The survey this time around is being carried out by Ipsos (an independent research organisation) on behalf of the Centre for Longitudinal Studies at University College London (UCL), which runs the study.



What would we like you to do?

We would like you to complete a survey about your life now and how things have changed for you over the past few years. We will ask about your family and social life, your housing circumstances, your employment and income, your education, and your health and wellbeing.

During the survey we will:

- Ask for your permission to add information held about you in records maintained by various government departments and agencies (if you haven't previously given these).
- Ask if you would be willing to provide a saliva sample so we can analyse your DNA for research.

The survey should take around 60 minutes to complete, but it can be slightly quicker or longer depending on your circumstances.

By taking part you are helping us make life better for your generation and the next. It is entirely voluntary, but we hope you will be able to find the time to help us.

Please take time to read the enclosed booklets as they provide full details on what the survey involves.



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What's next?

We'd like you to do the survey online as it's quicker and easier for you, and efficient for us. But if we do not hear from you, we will also try contacting you in person or by telephone.

To get started, please visit the web link below and enter your online password.

<https://ipsos.uk/NS32>
ONLINE PASSWORD:

If we have an email address for you, we will also send your login details there.



Thank you

To say thank you for your help, we will send you a **£20 voucher** which can be spent in a range of shops or websites or can be donated to a charity. If you provide a saliva sample we will send you an additional voucher of £10.



Will the information you give remain confidential?

The information you give will be used for research purposes only and in accordance with the General Data Protection Regulation (GDPR). Your personal details will be kept strictly confidential and separate from the answers you give, so you can't be identified. More detail about privacy and confidentiality is available in the enclosed booklet and on the Next Steps website: nextstepsstudy.org.uk/home/privacy/.



Any questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on Freephone 0800 1522516.

Thank you for your help with this important study.

L. Calderwood

Lisa Calderwood

Study Director, Next Steps

19-099767/L01



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10.4 The advance email



FIELD SERIAL

NEXT STEPS AGE 32 SURVEY

Hi \$FF_CM_FirstName,

Back in 2004, you and around 16,000 other young people were specially selected to take part in the first survey of what would become Next Steps. Since then, there have been seven main surveys with study members, to see how your lives have changed. The next survey is happening now and we really hope that you will take part again. We would love to learn where you are and what you've been doing since we last spoke to you. To thank you for your help, we will send you a voucher (see more information below).

[Take Part now](#)

The survey this time around is being carried out by Ipsos (an independent research organisation) on behalf of the Centre for Longitudinal Studies at University College London (UCL), which runs the study.



What would we like you to do?

We would like you to complete a survey about your life now and how things have changed for you over the past few years. We will ask about your family and social life, your housing circumstances, your employment and income, your education, and your health and wellbeing.

During the survey we will:

- Ask for your permission to add information held about you in records maintained by various government departments and agencies (if you haven't previously given these).
- Ask if you would be willing to provide a saliva sample so we can analyse your DNA for research.

The survey should take around 60 minutes to complete, but it can be slightly quicker or longer depending on your circumstances.

By taking part you are helping us make life better for your generation and the next. It is entirely voluntary, but we hope you will be able to find the time to help us.

Please take time to read the following booklets as they provide full details on what the survey involves:

- ['We need your help' booklet](#)

- [‘Adding information from your administrative records’ booklet](#)
- [‘Why should I give a saliva sample’ booklet](#)



What's next?

We'd like you to do the survey online as it's quicker and easier for you, and efficient for us. But if we do not hear from you, we will also try contacting you in person or by telephone. To get started, visit <https://ipsos.uk/NS32> and enter your online password: \$PANELISTID, or just click the button above.



Thank you

To say thank you for your help, we will send you a voucher which can be spent in a range of shops or websites or can be donated to a charity. Because it's cheaper for us if you do the survey online, we can offer you a £EarlyIncentiveAmount voucher. To claim this, you need to complete the survey online within three weeks. After that we will only be able to give you a £LateIncentiveAmount voucher for taking part.

If you provide a saliva sample we will send you an additional voucher of £10.



Will the information you give remain confidential?

The information you give will be used for research purposes only and in accordance with the General Data Protection Regulation (GDPR). Your personal details will be kept strictly confidential and separate from the answers you give, so you can't be identified. More detail about privacy and confidentiality is available in the booklet ('We need your help') and on the Next Steps website: nextstepsstudy.org.uk/home/privacy/.



Any questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on Freephone **0800 1522516**.

Thank you for your help with this important study.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps



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EH6 7EZ



0800 1522516



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10.5 Breakoff email reminder 24 hour



\$FIELDSERIAL

NEXT STEPS AGE 32 SURVEY

Hi there, \$FF_CM_FirstName,

It looks like you started filling out the Next Steps survey, but you haven't quite finished yet. Thanks for getting started. It's really important for the study that you go on to complete the whole thing. You can then claim your voucher.

[Click here to continue](#)

If you have not completed the survey by \$DeadlineDate, we will try to get in touch in person or by telephone.

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on **Freephone 0800 1522516** or visit <https://nextstepsstudy.org.uk>.

If you are having problems accessing the survey, visit <https://ipsos.uk/NS32> and enter your online password: \$PANELISTID. You'll return to the place in the questionnaire where you left off.

Thank you for your help with this important study.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps



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10.6 Breakoff email reminder 48 hour

Hi {~FF_CM_FIRSTNAME~}, you haven't quite finished your Next Steps survey. Complete it now to claim your <earlyincentive> voucher. To continue please visit <https://ipsos.uk/NS32> and enter your online password <<Login password>>. Any questions? Please visit www.nextstepsstudy.org.uk or call Freephone 0800 1522516.

10.7 Online only fieldwork Day 4 Email reminder



\$FIELDSERIAL

NEXT STEPS AGE 32 SURVEY

Hello again, \$FF_CM_FirstName,

We wrote to you a few days ago to invite you to take part in an online survey for Next Steps. It looks like you haven't had a chance to get started yet.

There's still time for you to take part online and get a £\$EarlyIncentiveAmount voucher as a thank you. By taking part you can help us to find new ways to make life better for your generation and the next.

[Take part now](#)

If you have recently completed the survey, we are sorry for bothering you again.

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on **Freephone 0800 1522516** or visit <https://nextstepsstudy.org.uk>.

If you are having problems accessing the survey, visit <https://ipsos.uk/NS32> and enter your online password: \$PANELISTID.

Thank you for your help with this important study.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps



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10.8 Online only fieldwork Day 10 Email reminder



\$FIELDSERIAL

NEXT STEPS AGE 32 SURVEY

Hello again, \$FF_CM_FirstName,

We wrote to you recently to invite you to take part in an online survey for Next Steps. It looks like you haven't had a chance to get started yet.

To get your £\$EarlyIncentiveAmount voucher finish the survey by \$DeadlineDate.

Take Part Now

Ideally, we would like you to take part online as it's quicker and easier for you, and cheaper and efficient for us. But if you don't take part online, we'll try contacting you in person or by telephone and we will only be able to offer a £\$LateIncentiveAmount voucher as a thank you for taking part.

If you have recently completed the survey, we are sorry for bothering you again.

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on **Freephone 0800 1522516** or visit <https://nextstepsstudy.org.uk>.

If you are having problems accessing the survey, visit <https://ipsos.uk/NS32> and enter your online password: \$PANELISTID.

Thank you for your help with this important study.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps





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10.9 Online only fieldwork Text reminder Day 7

Hi, {~FF_CM_FIRSTNAME~}. There's still time to take part in Next Steps and get your <<earlyincentive>> voucher. Please visit <https://ipsos.uk/NS32> and enter your online password <<Login password>>. Any questions? Please visit www.nextstepsstudy.org.uk or call Freephone 0800 1522516.

10.10 Online only fieldwork Text reminder Day 12

Hi, {~FF_CM_FIRSTNAME~}. Last chance to take part in Next Steps and get your << earlyincentive >> voucher. Please visit <https://ipsos.uk/NS32> and enter your online password <<Login password>>. Any questions? Please visit www.nextstepsstudy.org.uk or call Freephone 0800 1522516.

10.11 Online only fieldwork postal reminder Day 7



\$FIELDSERIAL

NEXT STEPS AGE 32 SURVEY: We would love to hear from you

Hello again, <FF CM_FIRSTNAME>,

We wrote to you last week to invite you to take part in an online survey for Next Steps. It looks like you haven't had a chance to get started yet.

There's still time for you to take part online and get a <<early incentive>> voucher as a thank you. We would love to learn where you are and what you've been doing since you last took part. By taking part you can help us to find new ways to make life better for your generation and the next. Taking part is entirely voluntary but we do hope you will be able to find the time to help us.

If you have recently completed the survey, we are sorry for bothering you again.



What's next?

To get started, please visit the web link below and enter your online password:

<https://ipsos.uk/NS32>
ONLINE PASSWORD



Will the information you give remain confidential?

The information you give will be used for research purposes only and in accordance with the General Data Protection Regulation (GDPR). Your personal details will be kept strictly confidential and separate from the answers you give, so you can't be identified. More detail about privacy and confidentiality is available on the Next Steps website: nextstepsstudy.org.uk/home/privacy.



Any questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on Freephone 0800 1522516 or visit <https://nextstepsstudy.org.uk>

Thank you for your help with this important study.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps



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10.12 Tracing letter



Reference number:

19-099767/T3

Dear,

You may remember taking part in a research study called Next Steps a few years ago. Next Steps is a major national study following the lives of over 16,000 people in England born in 1989-90. The study makes a vital contribution to research and policy making on a range of issues including education, employment, housing, and health.

The latest survey is happening right now and we really hope you can take part. By taking part you can help us find new ways to make life better for your generation and the next. As a thank you for your help we will give you a voucher which can be spent online in a range of stores or can be donated to a charity. **Your continued participation in the study is very important to us.**

An interviewer from Ipsos, an independent research organisation, who are carrying out the survey on behalf of the Centre for Longitudinal Studies at University College London has visited the address we have on file for you and been told you now live elsewhere.

The interviewer spoke to
who did not wish to give your new address without your permission, but agreed to forward this letter to you.

We would appreciate it if you could contact Ipsos to update your current address and contact details. There are three ways you can do this:

- Email us at uk-nextstepssurvey@ipsos.com
- Call us on Freephone 0800 1522516
- Or complete the reply slip below and return it to Ipsos in the enclosed Freepost envelope - you will not need a stamp.

By giving us your address, you are not committing yourself to taking part in the study again. Once you have confirmed your new details you will be contacted by an interviewer who will provide you with information about the survey and invite you to take part. If you are happy to take part, they will arrange a convenient time to visit you.

If you have any further queries about the study, please do not hesitate to contact Ipsos on Freephone **0800 1522516**, or email uk-nextstepssurvey@ipsos.com or visit www.nextstepsstudy.org.uk.

Yours sincerely,

Lisa Calderwood
Study Director, Next Steps

Please complete this form using BLOCK CAPITALS and return in the FREEPOST envelope:

Reference.....

Title: First name:

Surname:.....Previous surname (if applicable):.....

Date of Birth:.....

Address:..... Postcode:.....

Phone:.....Email.....

10.13 Occupier letter



Date:

Dear Sir/Madam,

We are trying to make contact with the person named on the slip below who has taken part over many years in an important research study. According to our records they are living at this address. An interviewer working on behalf of Ipsos, an independent research organization, who are carrying out the survey on behalf of the Centre for Longitudinal Studies at University College London has visited your address several times but has been unable to find anyone at home.

If you are the person named below, please let us know if you are still living here and we will ask the interviewer to try and make contact with you again. If this letter has been forwarded to you from a different address, please let us know your full current address and contact details.

If you are not the person who took part in the study, please can you help by forwarding this letter to our study member; or by giving us details of their new address, or the name and address of someone else who might be able to help us.

If you do not know of any way of getting in touch with our valued study member, please let us know so that we can update our records and avoid contacting you again.

There are three ways you can do this:

- Email us at uk-cohortstudy@ipsos.com
- Phone us on Freephone 0800 1522516
- Complete the slip below and return it in the enclosed FREEPOST envelope - you will not need a stamp.

Thank you for your help.

Yours faithfully,
Lisa Calderwood, Study Director

**CENTRE FOR
LONGITUDINAL
STUDIES**



✂

We are trying to contact:.....**Reference:**.....

Please tick the appropriate box below, and fill in the details over the page

- A. I am the person named above
- B. I am not the person named above, but I know a forwarding address for them.....
- C. I am not the person named above but I know someone who may be able to help
- D. I do not know the whereabouts of the person named above
- E. I do not know this person.....

THE INFORMATION YOU GIVE WILL BE TREATED IN STRICTEST CONFIDENCE If you have any questions, please contact the research team on Freephone **0800 1522516** or by email at uk-cohortstudy@ipsos.com

Please give address details below, using BLOCK CAPITALS

Address:.....

Postcode:..... **Telephone:**.....

Email address:.....

If you are the person named overleaf, please also complete the following:

Surname:..... **First name(s):**

Date of birth: **Previous surname:**

Please help by completing this form and returning it in the enclosed FREEPOST envelope to Ipsos - you won't need a stamp if you post it in the UK.

10.14 The advance mop up email



FIELD SERIAL

NEXT STEPS AGE 32 SURVEY

Hello \$FF_CM_FirstName,

You may remember taking part in a research study called Next Steps, which you first joined when you were at secondary school. Earlier this year we invited you to take part in the latest survey, but we were either unable to reach you or you could not take part at the time.

There's still an opportunity for you to take part by completing our shortened web survey. It will take around **20 minutes** to complete and we'll send you a **£\$INCENTIVE** shopping voucher to thank you for your help.

The survey is about your life now and how things have changed for you over the past few years. Please take time to read the enclosed booklet which provides full details on what the survey involves.

By taking part you can help us to find new ways to make life better for your generation and the next. Taking part is entirely voluntary but we do hope you will be able to find the time to help us. No one else can take your place in this important study. It's your story, and only you can tell it.

What's next?

To complete the survey, please visit the web link below and enter your online password:

LINK
Password:

Will the information you give remain confidential?

The information you give will be used for research purposes only and in accordance with the General Data Protection Regulation (GDPR). Your personal details will be kept strictly confidential and separate from the answers you give, so you can't be identified. More detail about privacy and confidentiality is available on the Next Steps website: nextstepsstudy.org.uk/home/privacy.

Any questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on Freephone 0800 1522516 or visit <https://nextstepsstudy.org.uk>.

Thank you for your help with this important study.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps



NEXT STEPS SURVEY

Freepost Plus
RUEJ-LAXH-XLTG
Next Steps Study
Ipsos
Links House
15 Links Place
Edinburgh
EH6 7EZ



0800 1522516



uk-nextstepssurvey@ipsos.com



nextstepsstudy.org.uk

FOLLOW US ON SOCIAL MEDIA



@nextstepsstudy

10.15 Mop up email reminder Day 4



\$FIELDSERIAL

NEXT STEPS AGE 32 SURVEY

Hello again, \$FF_CM_FirstName,

We wrote to you a few days ago to invite you to take part in an online survey for Next Steps. It looks like you haven't had a chance to get started yet.

There's still time for you to take part online and get a £\$LateIncentiveAmount voucher as a thank you. By taking part you can help us to find new ways to make life better for your generation and the next.

[Take part now](#)

If you have recently completed the survey, we are sorry for bothering you again.

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on **Freephone 0800 1522516** or visit <https://nextstepsstudy.org.uk>.

If you are having problems accessing the survey, visit <https://ipsos.uk/NS32Online> and enter your online password: \$PANELISTID.

Thank you for your help with this important study.

Morag Henderson
Study Director, Next Steps



NEXT STEPS SURVEY
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Next Steps Study
Ipsos
Links House
15 Links Place



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Edinburgh
EH6 7EZ



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10.16 Mop up email reminder Day 10



\$(FIELD)SERIAL

NEXT STEPS AGE 32 SURVEY

Hello again, \$(FF_CM_FirstName),

We wrote to you recently to invite you to take part in a short online survey for Next Steps. It looks like you haven't had a chance to get started yet.

To get your £\$(LateIncentiveAmount) voucher please complete the survey by \$(DeadlineDate).

[Take part now](#)

If you have recently completed the survey, we are sorry for bothering you again.

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on **Freephone 0800 1522516** or visit <https://nextstepsstudy.org.uk>.

If you are having problems accessing the survey, visit <https://ipsos.uk/NS32Online> and enter your online password: \$(PANELISTID).

Thank you for your help with this important study.

Morag Henderson
Study Director, Next Steps



NEXT STEPS SURVEY

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[nextstepsstudy.org.uk](https://www.nextstepsstudy.org.uk)

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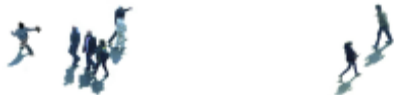
10.17 Mop up text reminder Day 7

Hi, (-FF_CM_FIRSTNAME-). There's still time to take part in Next Steps and get your <<lateincentive>> voucher. Please visit <https://ipsos.uk/NS32Online> and enter your online password <<Login password>>. Any questions? Please visit www.nextstepsstudy.org.uk or call Freephone 0800 1522516.

10.18 Mop up text reminder Day 10

Hi, (-FF_CM_FIRSTNAME-). Last chance to take part in Next Steps and get your << lateincentive >> voucher. Please visit <https://ipsos.uk/NS32> and enter your online password <<Login password>>. Any questions? Please visit www.nextstepsstudy.org.uk or call Freephone 0800 1522516.

10.19 Mop up postal reminder day 10



§FIELD SERIAL

NEXT STEPS AGE 32 SURVEY: We would love to hear from you

Hello again, <FF CM_FIRSTNAME>,

There's still time for you to take part online. Completing the survey will only take around 20 minutes and we will send you a £30 voucher as a thank you. We would love to learn where you are and what you've been doing since you last took part. By taking part you can help us to find new ways to make life better for your generation and the next. Taking part is entirely voluntary but we do hope you will be able to find the time to help us.

If you have recently completed the survey, we are sorry for bothering you again.



What's next?

To get started, please visit the web link below and enter your online password:

<https://ipsos.uk/NS32>
ONLINE PASSWORD



Will the information you give remain confidential?

The information you give will be used for research purposes only and in accordance with the General Data Protection Regulation (GDPR). Your personal details will be kept strictly confidential and separate from the answers you give, so you can't be identified. More detail about privacy and confidentiality is available on the Next Steps website: nextstepsstudy.org.uk/home/privacy.



Any questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on **Freephone 0800 1522516** or visit <https://nextstepsstudy.org.uk>

Thank you for your help with this important study.

Morag Henderson
Study Director, Next Steps



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10.20 Saliva letter



\$FIELDSERIAL

SALIVA COLLECTION FOR THE NEXT STEPS AGE 32 SURVEY

Thank you for taking part in the Next Steps Age 32 survey. During the survey you agreed to provide a saliva sample so we can analyse your DNA. We are writing to you to explain how to collect the sample. Once we have received your sample we will send you a £10 voucher as a thank you for your help.

What would you like me to do?

This pack includes a saliva sample kit, an instruction booklet, and packaging to return your sample in the post. The process for collecting and packing the sample will take about 10 minutes. **We would like you to follow the instruction booklet and watch the instruction video using the QR code below or using this link: www.explainmyprocedure.com/nextsteps.**

Please return the sample as soon as possible in any postbox. If you cannot return the sample immediately after collecting, please store at room temperature away from direct sunlight and return the sample as soon as you are able to.

What if I have COVID-19 symptoms or have tested positive?

If you are currently displaying COVID-19 symptoms or have tested positive, please do not take the saliva sample today. Please wait until any symptoms have passed. In the meantime, the kit can be stored safely at room temperature.

Any questions?

Frequently asked questions can be found on the back of this letter. If you have questions or would like to find out more about Next Steps, please contact Ipsos uk-nextstepssurvey@ipsos.com or on Freephone 0800 152 2516.

Scan QR
code for
instruction
video



We hope that you will be able to take part.

Thank you in advance for your help.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps



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FREQUENTLY ASKED QUESTIONS

Why are you collecting saliva?

Saliva samples allow us to analyse DNA, which is the set of instructions for how our bodies are put together. Our DNA can determine whether we develop certain health conditions, but our behaviour, housing, finances and other factors matter too. Combining all these different things in one study can help reveal what's driven by our genes, what isn't, and how our genes and environment work together.

Why is saliva important to Next Steps?

There are few studies in the world like Next Steps, that collect a broad range of information over time to try and understand the whole person. DNA is an important piece of this puzzle. By combining information about genes with the answers to the survey questions, Next Steps can paint a fuller picture of your generation.

Who is responsible for this research?

The Centre for Longitudinal Studies at University College London (UCL) run the Next Steps study and are working with the University of Bristol who will receive the sample that you send.

What will happen to the saliva I provide?

DNA will be extracted and stored securely at a laboratory at the University of Bristol. Your sample will be labelled with a unique ID number so that results of any testing can be linked with the other information we hold about you. The laboratory will not have access to your name and address or any other information the study holds about you.

10.21 Saliva email reminder



\$FIELDSERIAL

NEXT STEPS AGE 32 SURVEY

Hi \$FF_CM_FirstName,

We still haven't received your saliva sample for the Next Steps study, but there's still time to send it in. We need as many study members as possible to provide a sample in order to support important research on the role genetics play in our lives and health.

When we receive your sample, we'll send at £10 voucher as a thank you for your help. If you've already sent us your sample, thank you! It should arrive in the lab soon and may have been a little delayed by the postal strikes.

How to collect your sample and send it to us

If you haven't gotten around to collecting your sample yet, it only takes a few minutes. You watch this video for step-by-step instructions on how to do it: www.explainmyprocedure.com/nextsteps

When you've collected your sample, place it in the jiffy bag provided with your collection kit and pop it in any standard post box. The postage is prepaid.

Got questions?

There's more information about [giving a saliva sample on the Next Steps website](#). If you've still got questions, you can contact us at 0800 1522516.

Thank you in advance for your help.

A handwritten signature in grey ink that reads 'L. Calderwood'.

Lisa Calderwood
Study Director, Next Steps



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10.22 Thank you letter



Dear <<FF_CM_FirstName >> ,

Thank you for taking part in the Next Steps Age 32 Survey. Your participation is very important to us as it helps us understand the issues affecting people of your age today and find ways to make things better for your generation and those to come. Keep up to date with the latest news about the study at nextstepsstudy.org.uk.

Thank you

As a thank you for taking part please use the details below to access your voucher. You will have 6 months in which to redeem the code (an expiry date will be shown when you access the voucher).

www.example.co.uk
Passcode: XXXX

Your choices about adding information from your administrative records

{DLCNS32ALL}: <During your interview we asked you if you would be willing to give permission for us to securely add information held by some government departments and agencies to the information collected about you in the study. The table below confirms which permissions you gave and which you did not.>

You can change or withdraw any of your permissions at any time by contacting the Next Steps team at the Centre for Longitudinal Studies using the contact details on the back cover of the 'Adding information from your administrative records' booklet.>

{DLCNS32ONE}: <When you took part in the Age 25 Survey we asked you if you would be willing to give permission for us to securely add information held by some government departments and agencies to the information collected about you in the study. In the Age 32 Survey we asked you about the permissions that you did not give at 25. The table below confirms which permissions you gave at either 25 or 32, and which you have not given.>

You can change or withdraw any of your permissions at any time by contacting the Next Steps team at the Centre for Longitudinal Studies using the contact details on the back cover of the 'Adding information from your administrative records' booklet.>

{DLCNS25ALL}: When you took part in the Age 25 Survey we asked you if you would be willing to give permission for us to securely add information held by some government departments and agencies to the information collected about you in the study. The table below confirms the permissions you gave in the Age 25 Survey.

You can change or withdraw any of your permissions at any time by contacting the Next Steps team at the Centre for Longitudinal Studies using the contact details on the back cover of the 'Adding information from your administrative records' booklet.>

NHS Digital

<<Yes (at Age 25 survey)>> <<Yes (at Age 32 survey)>><<<<No>>>>

Department for Education and the Higher Education Statistics Agency	<<Yes (at Age 25 survey)>> <<Yes (at Age 32 survey)>><<<<No>>>>
Universities and Colleges Admission Services (UCAS)	<<Yes (at Age 25 survey)>> <<Yes (at Age 32 survey)>><<<<No>>>>
Student Loans Company (SLC)	<<Yes (at Age 25 survey)>> <<Yes (at Age 32 survey)>><<<<No>>>>
His Majesty's Revenue and Customs (HMRC)	<<Yes (at Age 25 survey)>> <<Yes (at Age 32 survey)>><<<<No>>>>
Department for Work and Pensions (DWP)	<<Yes (at Age 25 survey)>> <<Yes (at Age 32 survey)>><<<<No>>>>
Ministry of Justice (MOJ)	<<Yes (at Age 25 survey)>> <<Yes (at Age 32 survey)>><<<<No>>>>

<SALCONC=1> Saliva collection

<Thank you for agreeing to provide a saliva sample. Please return your saliva sample promptly to ensure you receive your additional £10 voucher. Once we have received the sample, we will contact you again and provide you with the voucher details.>

Who can I contact if I have any concerns after taking part?

We hope taking part in our survey has been a positive experience. But if it leaves you worrying about anything that's happening in your life, there are organisations you can talk to. Should you require them, contact details for sources of support can be found on the study website: nextstepsstudy.org.uk/helplines. You can also contact the Next Steps team at the Centre for Longitudinal Studies at nextsteps@ucl.ac.uk or on **Freephone 0800 977 4566**.

Change of contact details

If you move in the future, or any of your other contact details change, please update your details on the study website nextstepsstudy.org.uk.

Any questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on **Freephone 0800 1522516**.

Thank you for your help with this important study. We look forward to continuing to follow your lives.

L. Calderwood

Lisa Calderwood
Study Director, Next Steps

10.23 Saliva thank you letter



\$FIELDSERIAL

NEXT STEPS AGE 32 SURVEY

Hi \$FF_CM_FirstName,

Thank you for providing a saliva sample.

By giving us your sample, you are helping researchers understand how genes and environment interact to impact people's health, wellbeing and behaviour.



Thank you

As a token of our appreciation, please use the details below to access your £10 voucher. You will be given the opportunity to combine this voucher with your other one.

[\\$SalivaAutologinurl](#)



What if I change my mind?

You can withdraw your consent for the use of your sample at any time, without giving a reason, by writing to us at:

Next Steps
Centre for Longitudinal Studies
UCL Social Research Institute
20 Bedford Way
London
WC1H 0AL

Or email us at: nextsteps@ucl.ac.uk



Any Questions?

If you have any questions or would like to find out more about Next Steps, please contact Ipsos at uk-nextstepssurvey@ipsos.com or on Freephone 0800 1522516.

Thank you again for your help with this important study.

L. Calderwood .

Professor Lisa Calderwood
Study Director, Next Steps



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