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Delivering the European Social Survey's mixed-mode round and preparing for a fully self-completion future

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CSDI Workshop 2026, Vienna
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europeansocialsurvey.org

ESS is a European Research Infrastructure Consortium (ESS ERIC)



ESS's mode transition

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- The first 9 rounds of the ESS (2002-2018) were conducted exclusively with face-to-face interviewing to prevent mode effects (Jowell et al, 2007)
- A self-completion approach was unexpectedly implemented by 9 countries during the pandemic-affected Round 10, following piloting (Fitzgerald, 2021)
- After a recommendation by an ESS commissioned strategic review (Sturgis et al, 2020) – and the successful implementation of self-completion at Round 10 – it was decided to transition all data collection to self-completion – importance of all countries switching at same time
- ESS Round 12 (2025-26) uses a mixed-mode approach in almost all countries. Half the achieved sample interviewed face-to-face, half by self-completion (web and paper) - want to provide data users with a clear estimate of differences between the old and new modes
- From ESS Round 13 (2027-28) will use only self-completion data collection (web and paper)

What we will cover

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- ✓ Brief background to ESS's mode transition
- Early outcomes from mixed-mode ESS Round 12
- Development of ESS's first fully self-completion specification for Round 13
- Conclusions – including challenges and future priorities

Early outcomes from the mixed-mode ESS Round 12

Summary of Round 12 approaches

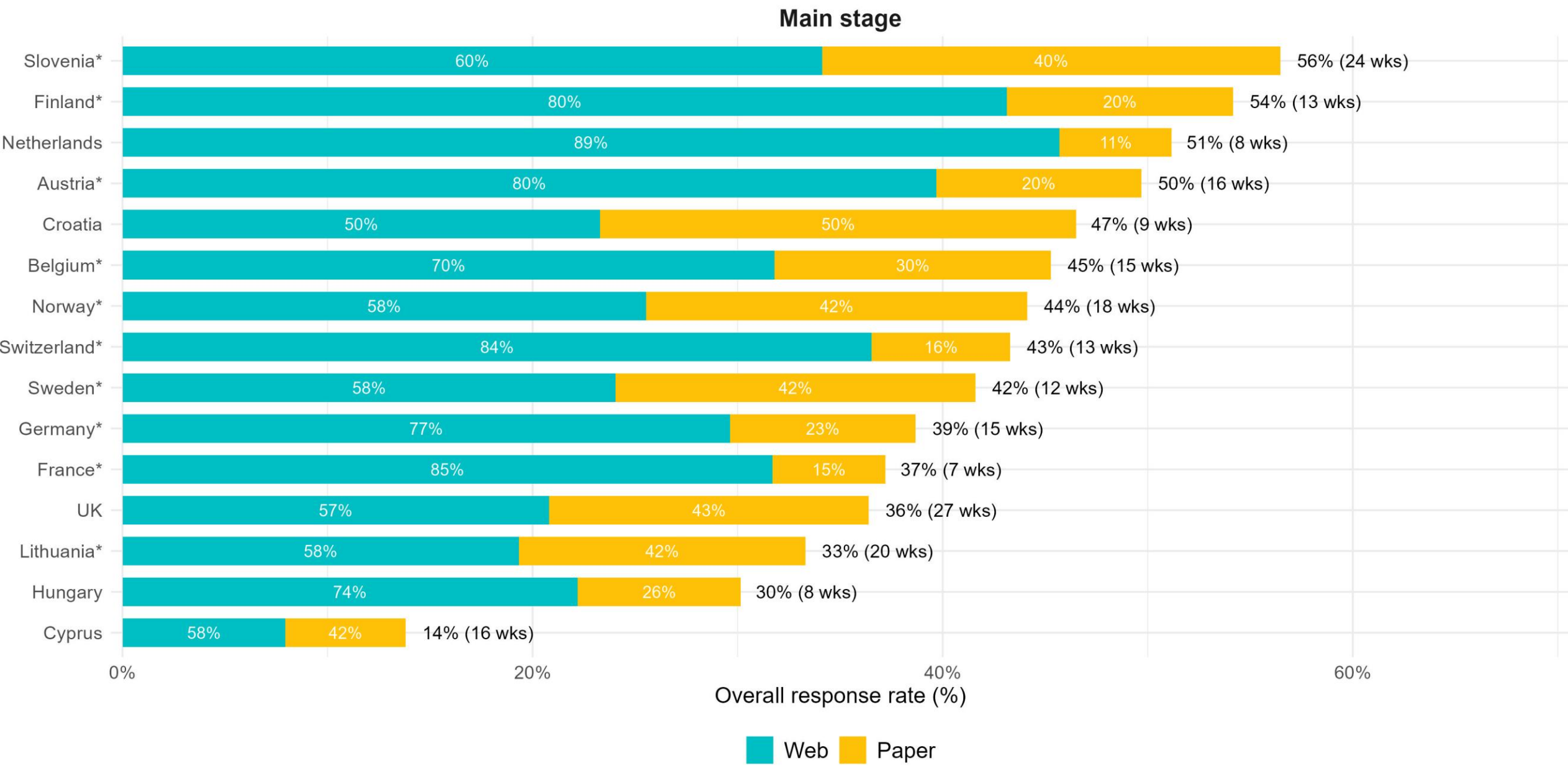
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- Expecting that 31 countries will participate at ESS Round 12
- 28 of the 31 will use mixed-mode data collection; self-completion only in Cyprus, Israel and Latvia
- Data collection started in September 2025; were aiming to complete by June 2026 but some countries will finish later in 2026
- Two data releases planned – November 2026 and April 2027 – combined data sets for face-to-face and self-completion
- Self-completion approaches:
 - Invitation letter and three reminders
 - Most countries using postal approach; some using fieldworkers
 - Mix of concurrent and sequential approaches
 - Unconditional incentives required where postal contacts used
 - Range of measures to maximise response and/or minimise nonresponse bias – in-person visits, email, SMS or phone reminders, additional incentives, extra (targeted) mailings

ESS Round 12 self-completion response rates (provisional)

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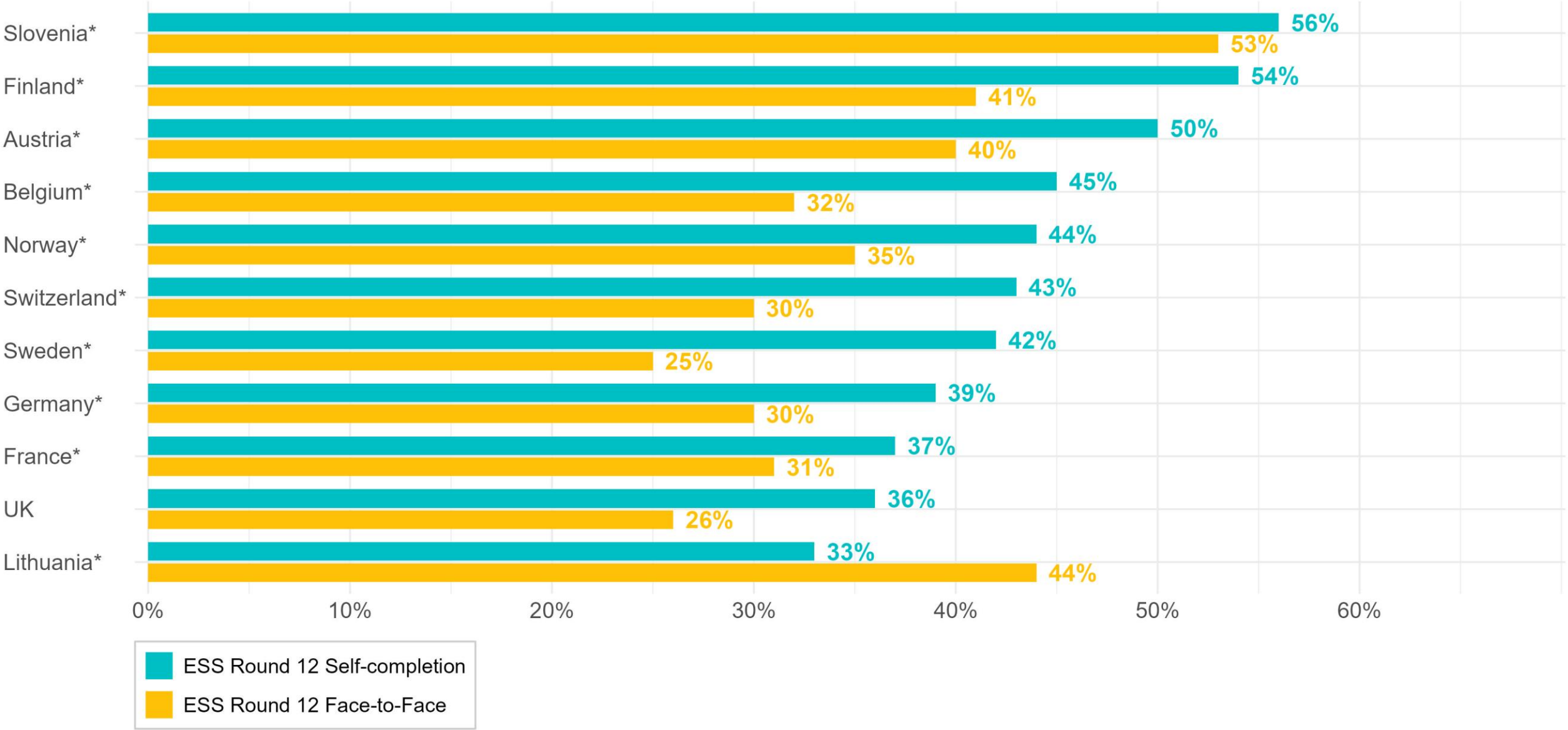
Proportion of web vs paper within overall response rate



* Countries that have completed self-completion data collection

Progress in ESS Round 12: Self-completion and Face-to-Face

Observed response rates across both modes



* Countries that have completed self-completion and face-to-face data collection

Sample representativeness

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- Too early to draw firm conclusions from self-completion sample compositions at Round 12 – but evidence so far suggests:
 - Self-completion overrepresents higher educated groups / underrepresents lower educated groups to a greater extent than face-to-face in many countries – though inclusion of paper helps improve sample balance
 - Self-completion age composition is potentially more accurate than face-to-face – but younger people sometimes underrepresented
 - Inconsistent pattern for gender; in some countries self-completion overrepresents women
 - Non-nationals / non-citizens underrepresented in many countries with self-completion
- Will learn lots more from Round 12 data – and can use learning to influence future strategies; new ESS Core Scientific Team partner appointed to focus on nonresponse

ESS's first self-completion specification

Main changes to self-completion specification from Round 12

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- Switched from mixed-mode approach to fully self-completion (web and paper)
- **Protocol for allowing interviewer-assistance with questionnaire completion**
- **Updated spec for targeted nonresponse phase to reduce nonresponse bias**
- Ideas for experimentation included / encouraged
- Other changes / tightening up data collection protocol (e.g. breakoff reminder)
- Introduction of LLM generated translation version into TRAPD approach
- Reduced questionnaire consultation process
- Increased quality control for data entry of paper questionnaires (double-entry)
- Additional ethics processes / requirements

Protocol for interviewer-assistance with questionnaire completion (1)

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- Round 12 self-completion specification did not allow interviewer assistance with completing the questionnaire
- Benefits of this strict 100% self-completion approach – consistency across sample, no interviewer effects; facilitating interviewer-assistance likely to be challenging for some countries to resource
- But concerns that strict approach excludes people who cannot self-complete (e.g. functionality illiterate, those with certain disabilities); also received some criticism – including at 2025 CSDI workshop
- Change made to specification for Round 13: *interviewers (or fieldworkers) are permitted to assist respondents in completing the questionnaire where it is judged that the only alternative would be their non-participation*
- Tightly controlled protocol to ensure that assistance is only provided in ‘essential’ cases
- Interviews done in-person or by video; interviewers would go through web or paper questionnaire with respondents (no separate CAPI script)
- Scale of requests uncertain (2-3%?); balance between inclusivity and (limited?) impact on the data and extra costs / complexity for national teams

(Targeted) measures to reduce nonresponse bias

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- Key objective for national teams at Round 13: to put in place strategies to reduce nonresponse bias (where it exists) and ultimately deliver more representative samples
- Teams to review existing national samples to assess groups likely to be under-represented
- Guidance in specification: ***where the level of relative bias versus the population target for a subgroup is greater than 25%, targeted nonresponse activities should be considered and will usually be required***
- Strategies will vary between countries based on information in sample frames and other practical factors – may include the following (ideally targeted):
 - Fieldworker visits to subset of nonrespondents after initial contact phase
 - Sending SMS, email or digital post reminders if contact details available
 - Sending additional mailing that is distinctive from primary mailings
- Require that where lower educated groups are under-represented, a (targeted) fieldworker nonresponse phase must be undertaken – expected that this personal contact may be more effective for this group rather than full reliance on postal letters

Conclusions

Conclusions

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- Early indications of ESS's self-completion approach are positive – response rates (much) better than we expected when first considering a mode switch and often above levels achieved on other surveys
- Mixed-mode 'bridge' round expected to be effective in preparing for full transition to self-completion at Round 13
- Several areas to further develop / improve:
 - Reducing nonresponse bias
 - Inclusivity and accessibility
 - Managing greater centralisation and oversight and ways of working with national teams – effective oversight vs micro-management
 - Refining fieldworker approaches
 - Assessing challenges to postal systems - and future suitability of different contact strategies (e.g. Digipost)
 - Analysing impact of mode switch on data and providing guidance for data users
- As with face-to-face approach – will be an ongoing journey to learn and improve approaches over time

Thank You



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