POLPAN Workshop 2012 ("Warsztaty POLPAN 1988-2013")

Jabłonna, October 7-9, 2012

Summary

The project, Polish Panel Survey, POLPAN 1988-2013: Social Structure and Mobility, is financed by the Polish National Science Centre in the framework of the Maestro 1 grant competition, decision no. DEC-2011/02/A/HS6/00238.

Introduction

Warsztaty POLPAN was a workshop organized by the POLPAN project team in Jabłonna on October 7-8, 2012. The workshop was the first in the series of working meetings designed to prepare the sixth wave of the Polish Panel Survey, POLPAN, for 2013. The aim of the workshops was to discuss theoretical and methodological questions connected with the preparation and administration of the survey. Participants are comprised of researchers involved in the POLPAN survey – academics who created it in the late 1980s, people cooperating in the administration of various survey waves, POLPAN data users and the new team members. The 25 years which have passed since the first POLPAN wave in 1988 was a period of turbulent political, economic and societal changes in Poland. During this period several phenomena appeared which shaped contemporary Polish society: high-scale unemployment, new technologies, labor migrations after Poland’s accession to the EU, and global terrorism. These changes are reflected in the POLPAN survey.

The structure of the Workshop was as follows. First, general strategic problems were presented and discussed during the Workshop theme sessions. Second, working groups — each consisting of Workshop participants – discussed specific, narrowly defined questions.

POLPAN History: Assumptions and Objectives

The topic of the first Workshop session was the history of POLPAN, including primary assumptions and aims of its creators, as well as circumstances and environment of the first POLPAN survey in 1988. From the point of view of further development, the crucial year was 1993, when the first panel survey was conducted: the research team drew respondents from the 1988 wave. At that time a universal scheme has been developed to describe respondents’ occupational career data. This scheme is responsible for the subsequent complicated structure of the data collection, but it also enables an in-depth inquiry into the nature of employment, taking into account the complexity of respondents’ professional careers.

Presenting and discussing the history of POLPAN was continued during the second session, and was devoted to the links between POLPAN and other surveys on social structure in Poland. Particularly important were the experiences from surveys conducted before 1988. It included the Łódź-Szczecin-Koszalin surveys initiated by Prof. Włodzimierz Wesołowski conducted in 1964-1967. They introduced a scheme of conceptualization of social structure, defined in categories of professional differentiation, as a basic platform of forming new types of classes, strata or socio-professional
groups. This conceptualization was the starting point for operationalizing stratification mechanisms. This led to the construction of indicators of class allocation – Social Classification of Occupations, which is used, with modifications, until today. The Łódź-Szczecin-Koszalin surveys also initiated the standardization of core variables; although they were only conducted in three cities, they made a breakthrough in social stratification surveys. Since the 1970s, several other poll surveys on social stratification have been conducted: A survey on material conditions by prof. Lidia Beskid (in 1975, 1982, 1989, 1991) with a repeated set of main questions; the survey, “Polacy 1980-2011”; surveys by Prof. Wieslaw Wiśniewski (1977, 1983 and 1986) which collected data on the links between the level of aspirations and attitudes towards education; “Situation of work and its psychological consequences” with Melvin Kohn of 1978, repeated in 1992 – on sample of men only; the survey, “Social Inequalities and Sense of Injustice in Social Structure” by Prof. Edmund Wnuk-Lipiński (1982-1987); the Polish-Australian project POLAUS with questions about prestige of occupations; the survey, “Social Stratification in Eastern Europe” guided by prof. Donald Treiman and Iván Szelényi in 1993 with a sequel in Warsaw; Polish General Social Survey (PGSS) since 1992; research of the Institute of Philosophy and Sociology of 1995 and 1999; the survey, “Is There a Formation of a Middle Class in Poland?” (Prof. Henryk Domański, 1998); Polish-Norwegian research of social, political and economic attitudes conducted in 2005 (POLNOR); and the European Social Survey (ESS) since 2002.

From the perspective of changes in social structure over time, these surveys provide data from various time points. With an appropriate harmonization, this would enable researchers to follow the changes of social structure in Poland from the 1960s until today. The abundance and accessibility of the data gives possibility of harmonization with the POLPAN data. This procedure would enrich the existing material with the new information. All of these surveys are cross-sectional, not panel.

Issues directly referring to the administration of surveys were discussed in the further part of the Workshop. The third session, called “POLPAN Sampling,” was devoted to the topic of sampling the respondents of the first wave, modifications of the sample in the next waves, and ways of renewing the sample with younger respondents. In 1988, the sample was randomized from the database of the Public Opinion Research Centre, ANLUD, which contained 130 000 people from 815 GUS census enumerated areas. In 1998, 2003 and 2008 the sample was randomized from PESEL database which included all inhabitants of Poland. In 1988, 9127 people aged 21-65 years were sampled and 5817 interviews were conducted. In 1993, due to budget constraints, 2259 people from the 1988 sample became the panel participants. In the third POLPAN wave, 1752 people from the previous samples were reexamined; moreover, 383 new respondents aged 21-30 years were added to the sample. This allowed researchers to reestablish the age balance of the respondents. In 2003, the sample was rejuvenated again, and 1699 interviews were conducted. In the last wave of 2008 the sample was supplemented by the over-representative group of young respondents, and the final sample counted to 1806 respondents. Among them there are 958 respondents who participated in all the waves since 1988, 151 were added in 1998, and 135 were added in 2003.

Non-response comes from various sources, including migration abroad and refusal to participate in the research. Taking into account the significance of the replication of the research, a question was

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raised at the Workshop about the possibility to reach those respondents who had been examined in the previous waves. In addition, the strategies of keeping the respondents in the panel were discussed. That concerned above all the 958 people who have participated in the research since its beginning in 1988.

It has been pointed out that despite modifications of the sample, losing respondents and the growing rate of refusals among the youngest cohorts, due to its panel character the POLPAN sample remains valuable. Some argued that the research team should try to restore the initial size of the sample by adding young respondents.

The problem of non-response and strategies of minimizing this risk were the main problem discussed during the fourth session, "POLPAN Fieldwork". Refusals are the weak point of all surveys, but they are especially problematic in panel surveys. Panels are specific because the value of respondents’ participation grows proportionally to the period of examination and number of waves. Similarly, the loss of a respondent after their participation in several waves is challenging. This is why special efforts need to be made to keep the most veteran respondents in the sample.

ORBS, which conducted the last three waves of the POLPAN survey, applies special procedures in order to maximize the efficiency of interviewers on each stage of the survey: preparation, fieldwork, control of work and data. The first set of procedures focus on the interviewers: selection of most qualified and experienced interviewers; members of the research team trains the interviewers; monitoring the work of interviewers during the research; and system of rewarding designed to motivate the most hard-working interviewers. The second set of procedures focus on the interviewees: telephone; two advance letters sent to respondents before the interview; an inserts designed to raise a respondent’s interest in the survey; incentives in a form of occasional gifts and souvenirs; and usage of non-contact cards in case of respondent’s absence at home during the visit. The third set of procedures concerns collecting methodological data on the survey administration: collecting data about contacts or loss of a contact with a respondent.

There has been success in reaching the most difficult respondents and the response rate is better than many other surveys, but non-response continues to pose challenges. There is a need for improvement by supplementing these strategies with new policies. One of the directions for such improvements is to disseminate the knowledge about POLPAN surveys and their significance – both in practical and theoretical dimensions. The research team also aims at the increase of use of POLPAN surveys in various studies on social stratification. In order to achieve this, a website, POLPAN.org, has been created. After the fieldwork phase of POLPAN 2013, the website will contain information about the surveys, documentation, and literature connected or based on POLPAN data, as well as the POLPAN data itself, prepared for usage in statistical analysis. The content of the website will be gradually improved by adding new information and additional functionalities, e.g. possibility of the on-line analysis of the data. POLPAN.org will be a part of a bigger campaign to popularize the survey in academic environment and wider public.

Other solutions were offered. Some solutions aimed at making the survey shorter to reduce respondent and interviewer burdens, and allowing for mixed modes by using mail surveys, computer assisted telephone interviews (CATI) and websurvey options. Diversification of these modes would allow POLPAN administrators to reach respondents who are abroad at the time of the data collection.
process. In order to improve the existing tools or apply more innovative approaches, more attention should be also paid to the past methods of contact with the respondent, such as letters of intent, inserts and gifts, and the interviewers’ remuneration system. A separate but connected matter is the issue of rebuilding the POLPAN sample to its original size from 1988 – by reaching the lost respondents or certain categories of them.

**Comparability of POLPAN**

The subject of the fifth session was comparability of POLPAN with other surveys. The differences in the distribution of key demographic and structural variables were discussed with reference to the European Social Survey (ESS) and POLPAN. In general, the comparison turned out to be satisfactory, but some discrepancies have been noticed in case of occupations (overrepresentation of farmers in POLPAN, underrepresentation of administration and non-technical intelligentsia, place of living (overrepresentation of countryside), age (underrepresentation of respondents aged 26 to 54), and structure of education. However, verification of the stability of results derived from POLPAN and other similar surveys shows that the differences do not significantly influence substantial results concerning the relation between social position and attitudes, political behaviors, social mobility and homogamy. Nevertheless, a special strategy should be developed for the difficult categories of respondents, in this case – non-technical intelligentsia living in big cities and the young. Another solution which seems worth consideration is survey weighting, however application of statistical weighting has its own complications.

In order to achieve comparability of POLPAN and other surveys (and also comparability between POLPAN waves), it is important to assure comparability of key variables, especially concerning careers. In some cases, this would require double data coding: according to SKZ (Social Qualification of Occupations, used in previous POLPAN surveys) and ISCO (International Standard Classification of Occupations, for international comparisons). The usage of the EGP (Erikson–Goldthorpe–Portocarero) class scheme is also envisaged.

As a main area of interest of POLPAN survey are careers, it is required that the classification of occupations is done parallel by two persons, also basing on the data from the previous years, in order to improve the quality of the data.

**Modifications of the questionnaire**

The second day of the Workshop began with a discussion about changes in the POLPAN questionnaire. A few reasons were advanced for questionnaire revision. First, changes occurring in the last few years require adapting research tools; some questions have lost their topicality, new phenomena worth inquiry emerge; after analysis, some questions turned out to be superfluous; and some items are under-used. Second, the questionnaire is long; this can exhaust the patience and energy of both the respondent and the interviewer, and influence the quality of response.

Questions which require reexamination are of two types: first, those not connected with the social structure and social mobility (the main themes of the survey) and second, those which would not be necessary in a 2013 survey. A special procedure has been suggested for these questions:

(a) The reason behind the existence of the item:
Does the problem in question require a panel survey? Do the repeated surveys give a satisfactory answer? Can the answers to these questions be interpreted with use of the data from the previous panels? How many publications and other research products have featured these items?

(b) Statistical diagnostic test for items whose continued existence needs justification:

1. Distribution of variation in the sample in each wave;

2. Are the answers to the questions a good indicator of constructs – from the perspective of differences in location in the social structure (dependency from at least one variable describing social position and age).

Detailed suggestions for changes of specific items were discussed in groups. Each group worked on one of the following sections of the questionnaire:

1. Description of work conditions
2. Family, household, friends and religion
3. Computer and Internet
4. Psychological and ideological variables
5. Health and intelligence

It has been also suggested that new items are added only by written report that clearly indicates the theoretical and methodological advantages of including the new item in the questionnaire, its links between the suggested item and other POLPAN questions, and the new research possibilities emerging from these item.

The seventh thematic session concerned the international context of POLPAN, and was conducted in English. The discussion focused on expanding awareness, access and use of POLPAN for scholars outside of Poland, and in Poland. It addressed the following questions: To what extent is POLPAN 1988 – 2008 used? Many argued that the content of POLPAN.org website would increase its attractiveness for various groups of recipients and make it easier to access; others offered that preparation of the training package of POLPAN data to be used in academic courses of statistical training, as well as preparing a publication about 25 years of POLPAN, would expand awareness and use.

Subject matters discussed earlier at the Workshop (conducting the 2013 survey, links between POLPAN and other surveys, statistical analyses possibilities) were debated in small groups after the last session.

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