

# FEASIBILITY STUDY FOR A POSSIBLE QUALITATIVE LONGITUDINAL STUDY: DISCUSSION PAPER

## 1. EXECUTIVE SUMMARY

1. The drivers towards Qualitative Longitudinal Research (QLR) are wide ranging and increasing. From the perspective of the ESRC it is part of an ongoing commitment to supporting UK longitudinal resources, investing in and scaling up from qualitative resources and making better use of secondary analysis of archived data. Within the wider research and policy communities the move towards QLR is fuelled by growing interest in processual features of social life, dynamic notions of career, contingency and the particular purchase that qualitative methods have on complexity and context.

2. A significant QLR literature already exists spanning the social sciences and applied research. Discussions of QLR methodology are less numerous and tend to be confined within disciplinary and substantive literatures. It is vital that in the process of forging a new generation of QL studies that the insights already generated within specific disciplines are recognised and built upon.

3. The kinds of QLR studies that exist can be distinguished into mixed methods approaches where qualitative longitudinal elements are attached to a quantitative study, planned prospective QL studies, follow-up studies and evaluation tracking studies. It can be difficult to draw the lines around what constitutes QLR, however for the purposes of this report we have focussed on approaches that are primarily qualitative and prospective or involve methodological enhancement of follow-up studies.

4. A cross-disciplinary and international consultation process was undertaken that included a review of the literature, an email questionnaire, individual interviews, consultation groups and participation at relevant events. Key stakeholders included those conducting existing QLR, research funders and users; qualitative researchers, longitudinal researchers, archivists and representatives of the ESRC's National Strategy Committee for Longitudinal Research.

5. The consultation established a strong scientific case for QLR, identifying a range of research issues to which it is suited, including the understanding of: transitions; pathways; changes and adaptations; evaluation; developmental, incremental and cumulative processes and a 'realistic' understanding of causality – how and why something happened as it did. The substantive areas in which QL methodology has most potential include the study of: family life and the life course; identity construction; processes (such as the onset of disability, illness, risk behaviour, mobility); the careers of groups of interest to policy and practice; organisational and community change and social trends. While most areas of research would benefit from the addition of a QL perspective some areas and phenomena can only be or are best studied in this way. The potential uses of a QL methodology are vast, and any study should have a compelling substantive case as well as offering a development of the method.

6. A danger of a major QL study is that it becomes an 'albatross', constrained by the weight of its research design and a burden on those responsible for keeping it moving. In order for a QL study to remain creative and productive it is vital that new ideas, theories and methodologies are drawn into it. One way of ensuring this process is through nurturing new researchers and encouraging the creation of a flexible data set and

a culture of experimentation and responsiveness. This points to a model of research in which a core sample might be elaborated or contextualised within a wide variety of data sources, making the most of and testing out research applications for new technologies in the context of a commitment to data archiving and data sharing. In this way a QL study could act as an important site of training, and theoretical and methodological development as well as giving rise to important research findings and providing a resource for secondary analysis.

7.. The ultimate value of a QL study may take many years to accrue, the tracing of historical trends over time, and of the effectiveness of policy assumptions that go beyond particular administrations. A QL study may eventually be able to show 'how new concepts emerge in society, and how these are developed and experienced.' For a study to be viable it must deliver at all stages of its development. In the short term the applied value of a QL study may come from comparative analysis and insights into short-term changes. In the medium term the focus could be on particular areas of policy in order to explore the complex relationship between policies, contexts and outcomes. In the longer term it may be possible to grasp a tangible sense of social change, intergenerational dynamics and the making of history. Like all qualitative research, QL is better at explaining complex processes and situations, than producing simple 'what works' evidence. For this reason there is a growing recognition of the value of QL data for the development of effective *practice* as well as effective policy.

8. The consultation process generated a range of insights in relation to the ideal scale and duration of such a study, the implications of different units of analysis, the structural, organisational and ethical challenges of a major QL study; the demands of data sharing, archiving and secondary analysis, strategies for analytic comparison, and the potential of this methodology for theoretical and methodological innovation as well as practical application in policy and practice. An analysis of this material established a number of objectives that should guide the ESRC's investment in QLR, including a commitment to:

- facilitate the further development of *qualitative* led perspectives on longitudinal research;
- draw on, develop, extend and communicate good practice in existing QLR methodology;
- build on the strength of both qualitative and longitudinal research in such a way that optimises the quality of small scale research as well as the economies and privileges of a large scale data set;
- focus on an understanding of temporal processes and research questions that can only be or are best answered using both longitudinal and qualitative strategies;
- create data sets that are suitable for deposit and secondary analysis;
- fully explore the ethical dimensions of QLR and to develop models of good practice;
- to properly resource the endeavour, ensuring sufficient time, security and support to realise its potential.

9.. On the basis of all of these sources of intelligence a series of models of feasible approaches to QLR are proposed within current resource parameters, each of which could employ a range of methods and each of which could adopt some form of a hub/node organisational structure:

(a) The first phase of a single qualitative longitudinal project, overall time scale 10- 20 years. Options include locality based, panel study and repeat cross sectional designs. Substantive areas could include family life/child development, community change, values, changes among key demographic groups.

(b) A nested model. This would be a collaboration between a number of research teams working on related topics, with a built in scaling up methodology and procedures. Substantive areas could include the life course, family life.

(c) A programme type model, in which the field guides the direction of the research, and in which existing QL studies and new QL initiatives could come together to take forward the methodology and tackle a range of practical and ethical challenges. Substantive areas to be defined by the field. Could be a precursor for models 1 or 2 here.

The advantages and disadvantages of each approach are discussed and a series of recommendations are made including the recommendation of the nested model two based on a co-ordinated network form of organisation. Further recommendations are:

- That ESRC considers both its short term (5 year) and longer-term strategy for supporting QLR and allocates sufficient funds to realise this commitment through whatever funding mechanisms are relevant. The range of options might include: direct funding on a par with other longitudinal studies; via a research centre or network; through extending the timeframe of responsive funding.
- That the ESRC establish and support the archiving costs for the chosen approach to QLR, and more generally encourage the development of secondary analysis of qualitative data.
- That for this initiative specifically, but also for other funding modes, the ESRC and other funders consider extending the 3-5 year time scale in order to support the accumulation of QL studies, and/or is sympathetic to researchers seeking to extend existing studies.
- That the ESRC works towards integrating qualitative perspectives into the existing framework for longitudinal studies. This may entail:
  - recruiting QL specialists to the National Longitudinal Strategy Committee;
  - integrating a major ESRC funded QL initiative or study within the auspices of the committee
  - working towards including a QL resource within funding arrangements for the major longitudinal resources
  - through these mechanisms to work with potential funders and users to recognise the value of QLR as an ongoing resource for policy development.
- That the ESRC also recognises the autonomy and specificity of QLR and its potential contribution to wider qualitative methodological development across social science disciplines and applications. This will entail integrating QLR into methodological development and training around qualitative research that may form part of the National Centre for Research Methods.

- That the ESRC respond to calls to establish an ethical panel the brief of which should include a range of issues arising from QLR fieldwork, analysis, archiving and secondary analysis.
- That the ESRC support ongoing methodological development in the area of QLR in addition to this initiative. This may take the form of supporting relevant fellowships, encouraging a focus on QLR as part of other methodological developments (for example as part of the work of the NCRM and supporting nodes, and the forthcoming secondary analysis initiative) as well as encouraging QLR designs in programme specifications and responsive mode funding guidance.

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