



## When Methods Meet: Quantitative and qualitative methods in social care research

Professor David Bell and Professor Alison Bowes (both University of Stirling), in conversation.

In this sixteen-minute film David Bell and Alison Bowes discuss the potential and also the challenges of combining quantitative and qualitative research methods in research into social care. They draw on examples of work that they have done together in looking at an issue that has great policy relevance, where the introduction of free personal care following Scottish devolution had the effect of creating a natural experiment. As an economist and a social policy researcher, they are both interested in what effects the availability of free care has had on the behaviour of unpaid carers. They describe how their collaboration has allowed them to ask better questions than if they had adopted either quantitative or qualitative methods on their own, and thereby to make sense of evidence that unpaid carers have not simply handed over caring work to paid professionals. In working together on mixed methods projects, they describe how they have needed to overcome differences of disciplinary languages and conventions about sampling and framing of research questions. The benefits of collaboration in mixed methods projects involving different disciplines in terms of methodological rigour and better quality data make these challenges worth taking on, and point to a future in which further innovations will take methodological practice in currently unpredictable directions.

### Transcript of conversation:

DB I am an economist, trained actually as an econometrician. So I spend a lot of my time on the sort of applied economics front, across labour economics, health economics, and fiscal policy. And mostly I work with large scale surveys, analysing them with standard software tools, and trying to make useful inference out of the data sets which are many and varied now.

AB Yes indeed. I am a broadly based qualitative social scientist. I started my training in anthropology and I have increasingly moved into more applied areas of sociology and social policy.

I use as I say qualitative methods, and those can be anything from a very broad based ethnographic approach to much more structured questionnaire or interview approaches.

We've worked together of course, many times, bringing together the qualitative and the quantitative side of things. And I think that's a very good area to be working in because it enables you to generate insights that as, particularly focussed research, you don't necessarily get from your own methods.

DB For me, it's about questioning the data. And whether we are getting the kind of data that we really want to answer the questions that we are interested in and we have examples in the past where joint working has helped us kind of fine tune our work in terms of finding out what we really need to work on.

AB Well absolutely, and I think there is a lot of qualitative researchers who perhaps assume that somehow for policy makers the quantitative is God and the quantitative is unquestionable, and unquestioned. And quantitative researchers are not critical about the data that they use. And that is patently not the case. I think one of the ways in which that questioning can be supported as you say is by bringing in different methods together.

DB I suppose that the main area that we've worked together is on care, social care as it's called now. And the policy context of that is pretty apparent if you watch any news bulletin because of the issues around the health service and the difficulties of finding appropriate settings for older people mainly, moving out of hospital into what is called social care. And the provision of that care is an area that we have started collaborating in. And it's economically very important. Social care costs about 2% of GDP. It also poses lots and lots of social issues.

AB The starting point for our work was the policy of free personal care which was brought into Scotland quite early on after devolution and began to suggest that Scotland was going to diverge from the rest of the UK in terms of policy and become some kind of natural laboratory or testing ground for new ideas. So we did some work for the Joseph Rowntree foundation looking at what the costs of free personal care were going to be, but also trying to unpick what difference it really would make in terms of people receiving care in their homes. And also for people who were supplying care on an unpaid basis, family care givers or informal care givers.

DB Even if you take it in a simple metric such as what would it cost to replace unpaid carers with professional paid carers, the implications for the public finances are fairly horrifying.

AB Absolutely, and one of the great fears when free personal care was brought in, was that all the unpaid carers would stop supporting the older people that they were looking for because suddenly there was a free service that they could down tools and take advantage of.

DB A lot of economists working at sort of a theoretical level expected that there would be extensive substitution between paid and unpaid carers once free personal care was introduced. And we started to look at that. And I was using a large scale survey. But when you look at the questions in relation to the provision of unpaid care, it's pretty broad the type of question that is asked. Do you provide care, how many hours of care do you provide, and

the question about substitution wasn't that clear because care isn't a single service that is provided, but because people want all kinds of different things,

AB So there is a very great need then to understand qualitatively what care is. What the people doing it consider their obligations to be. And you know in a very important sense, how they feel about it.

And one of the things we found was that how they feel about it is particularly important. And they qualitatively explained that they were doing it for all sorts of reasons. There were certain things that they absolutely had to do because the person just couldn't do it by themselves. And on some occasions those were so pressing that they just crowded everything else out.

The unpaid carers generally speaking welcomed the free personal care because this crowding out effect was then somewhat reduced. They could get somebody else to be going around doing the bathing and so on. So actually the quantity of work that the unpaid carers seem to be doing qualitatively didn't seem to reduce. It was that they started to do different things. So the overall amount of support that older people were receiving actually increased against the prediction of it staying the same due to substitution.

DB Yeah, our notion was that care is a bundle of services. And what we saw was a switching from more direct forms of care to the more ancillary things like organising the person's finances. Doing the shopping, that sort of thing, but the number of people who describe themselves as carers didn't really fall.

AB And it's actually very difficult to grasp this from the quantitative data sets available. And we felt there was a need to actually better inform what the quantitative data collectors were doing by reviewing what kinds of questions would be the most useful to ask.

DB In terms of these regular surveys of households which are done, which we rely on for a whole range of statistics that appear regularly in the news, things like unemployment, inflation rates, all of these are actually in one way or another, dependent on sets of questions that are asked of individuals on a regular basis. And I think economists in particular are guilty of not really looking into the way that these data are collected. What the pitfalls are. And the ways in which they are aggregated up, you know they direct policy in all kinds of different ways. We are too unquestioning about the basis on which the data are collected.

AB And there are indications in our qualitative work, of some of the deficiencies of that kind of data, so we did some quite detailed work with people who were doing really a lot of care, 24/7, and one of the first things you find is it's actually very difficult to work with those people who are as committed as that because they just don't have time to provide answers to questions.

And it's highly likely that in the very large data sets those people are simply not there.

And yet they are the people who are doing the biggest job of all, and possibly the people who from a policy point of view, need the most support and who, if they fall over, the people for who they care will make the biggest demands on services.

To my mind that alone is an argument for looking at these things more qualitatively, and trying to increase the sensitivity of survey questions.

DB Yes, I mean there is increasing the sensitivity, there is also trying as hard as possible to get a representative sample.

AB Yes,

DB Although I've got a set of interviewers out in the field at the moment and we are just looking at the kinds of data we are getting in and realising that the sample I've collected so far, isn't terribly representative.

Now there are always ways of correcting for that, but it's sometimes very dangerous because, as you say, certain groups will be partially excluded or almost completely excluded due to the circumstances in which they find themselves.

AB So how would you, in developing a survey, introduce good ways of finding out about people who support each other rather than simply a person giving care to another person?

DB Probably to start with a small group of individuals who are willing to spend a bit of time with you, explaining how this interaction works. And on the basis of that, develop a set of metrics based on hopefully a not too onerous interview, probably of both partners in this venture. And then rolling them out into a large scale survey so that you get some kind of notion of the overall scale of this activity and over time you will be able to develop estimates of trends and try to project those trends.

AB More researchers are more open to these kinds of collaborations as well. There was a time when you would teach undergraduate sociology and you would teach that the epistemological foundations of quantitative research were completely different from those of qualitative research. There is a growing literature now which is seriously challenging that. And I think that is a debate which will continue. But clearly with those external pressures it's something that social scientists are going to have to come to terms with.

DB Economists increasingly have been working not only with sociologists but political scientists, and that comes up at the interface say between intergovernmental relations and fiscal policy which I've been involved with a bit. And also with psychology, so some of my colleagues are very interested in behavioural economics which draws a lot of its foundations on psychology and the theories that have developed in that discipline.

AB I guess this is the way of the future. I don't think it's about challenges, the languages of the different disciplines are still not entirely together. I think we probably often talk about things that the other one thinks, 'what are they on about?' And if you produce a huge equation, I'm, it's just going to be completely over my head. If I was to produce a detailed conversation analysis you would probably think I'd gone off in a boat somewhere. But there are enough examples now to show that it's productive and worthwhile.

DB Yeah, there are enough points of contact, and the collaborations certainly have a future.

AB If somebody is doing a PhD in sociology, social policy, that kind of area, they need these days to be aware that mixed methods is a growing kind of approach. Whether it's practical in every case for them to actually do a mixed methods study, I think is a question because if they want to analyse a large data set say that in itself can constitute a whole PhD and similarly an in-depth qualitative piece of work is also going to probably be enough to do the whole thing.

But in terms of paying attention to the other possibilities, they should use literature to inform what they are doing. Or maybe talk to somebody who is doing a quantitative or a qualitative project in a similar area to try and make sure that they really interrogate what they are doing

properly and that they are aware of what difference it might make if they were to have some large scale data, or if they were to have some smaller scale qualitative data.

DB In many cases, funding bodies are looking for analysis which encompasses different approaches to the research issue or policy issue.

It's perhaps not the case that journals are quite as focussed on the multidisciplinary approach, and it's not impossible, but it is tricky and something to do perhaps with the history of the disciplines.

AB I think that's probably less the case for the other social sciences. A journal like Ageing in Society for example will look at multidisciplinary work more readily. But it's often a bit of a challenge to persuade the reviewers that you have genuinely brought the approaches together and you have genuinely generated new insights. Because they still tend to be sort of automatically sceptical about one end of things. I've certainly known of colleagues who have had difficulties publishing their work because they will send it to an economics journal which will say it's not economic enough, or you know you haven't deconstructed it enough.

DB Yes I've experienced that, with an article.

AB So it has its challenges, but new generations of academics will start new journals, the world does change and some people are worried about their disciplinary identities, and I think it's very important as somebody who has moved between disciplines during the course of my career, for people to understand that of course a discipline is historically specific.

DB I actually went to university to study natural philosophy which people now know as physics. And this is part of the historical development of different subjects. Their names change, exactly what they are studying changes over time. And it's a natural process of evolution.

AB And of course the increasing focus on mixed methods is part of the evolution of methods themselves. We can do things now that we couldn't do a very short time ago such as use visual methods. We can collect giant data sets that was simply not possible on the more qualitative side. We can use visual methods, we can analyse visual material in ways that we couldn't do. Or we could collect data on social networks and we can get computers to analyse those in very subtle ways.

I remember in my PhD I had a beautiful drawing of a number of social networks done with a stencil. I really think that mixed methods is something that is going to grow and develop and go in directions that we can't predict at all.

### Contributors

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Suggested questions for seminar discussion:

What sorts of questions do quantitative data about the provision of care allow researchers to answer? And what sorts of questions do qualitative researchers seek to provide answers to?

What would you expect to be the results of introducing a policy of personal care provision free of charge?

What sorts of people might be missing from survey data about care provision?

What sorts of misunderstandings about 'care' is it important for researchers to avoid?

Is it easier for a sociologist to understand the economic concept of substitution than it is for an economist to understand the point of conversation analysis?