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*Special Issue: Prospective Qualitative Research: New Directions,  
Opportunities and Challenges*

## COMMENTARY

### Promises and pitfalls of qualitative longitudinal research

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This commentary focuses on promises and pitfalls of qualitative longitudinal research (QLR). Longitudinal data on practices, perspectives, individual relevancies and experiences can be particularly advantageous for life course, social policy and health research. However, the complexity of QLR carries certain downsides, dilemmas and trade-offs. The commentary discusses implications of different qualitative methods for the investigation of stability and change, the tensions between flexibility and comparability, and challenges related to sampling and the explanatory power of QLR.

It is argued that the choices of methods for data collection and data analysis have stark implications for what can be determined as change and stability across time. In addition, several ways of ensuring comparability across time are described. Finally, sampling strategies are outlined that aim to achieve and maintain heterogeneity of cases.

As standards of good practice, the author advocates more thorough documentation of the methods of data collection, sampling and data analysis employed in QLR studies, along with a better description of instruments and how they are applied.

**Key words** qualitative longitudinal research • qualitative methods • sampling • life course • anticipation

#### Key messages

- In QLR the choice of methods have implications for what can be determined as change across time.
- Several ways of ensuring comparability across time are described.
- Sampling strategies are outlined aiming to achieve heterogeneity of cases.

To cite this article: Hollstein, B. (2021) Promises and pitfalls of qualitative longitudinal research, *Longitudinal and Life Course Studies*, vol 12, no 1, 7–17,  
DOI: 10.1332/175795920X16040851984946

## **Introduction: a new research area on the rise**

Longitudinal research takes into account time and the passing of time, following actors over time. In quantitative research a longitudinal study with measurements at several points in time is the favoured pathway for assessing causality, enabling distinctions between selection and influence effects. In this paradigm, standardisation of tools and of measurement is essential in accounting for changes or stability across time.

By contrast, less standardisation and more flexibility are core assets of qualitative research, which focuses on the practices, complex interaction patterns, perceptions, experiences and interpretations of social actors. Qualitative research aims to understand the meaning of these practices and interpretations in their situational, cultural and historical context. It does so through an iterative and flexible process, employing open and less standardised methods for data collection, and interpretative methods for data analysis. Qualitative longitudinal research (QLR) builds on these assets of qualitative research, placing special emphasis on time, the elapse of time and the changes or stability of practices, perceptions and interpretations when following actors through time. This also includes the perception and anticipation of the future as well as respective planning perspectives.

QLR – a fairly new field of research that barely existed 15 years ago – holds high promise, especially for life course research, social policy and health research. At the same time, it carries enormous complexity, amplifying the already existing challenges of qualitative research. Previous literature has particularly emphasised questions concerning confidentiality, anonymity and ethical dilemmas that arise in qualitative longitudinal studies (for example, [Thomson and Holland, 2003](#); [Taylor, 2015](#)) as well as the demands of research data management ([Henderson et al, 2012](#), for example).

In the following I will briefly sketch the central potentials and expectations linked to QLR. I will then address some critical aspects and pitfalls of research designs, and the practical aspects of conducting QLR. In particular, making reference to articles in this issue and other literature, I will discuss (1) the implications of different qualitative methods for data collection and analysis for determining stability and change across time, (2) the tensions between flexibility and comparability, the need for standardisation and different ways to measure stability and change, and (3) sampling issues and explanatory power of QLR.

## **The promise of qualitative longitudinal research**

A defining feature of QLR is the pivotal role assigned to time – the passage and experience of time, as well as its bearing on social processes. However, time itself is often not the centre of interest of such a study; instead, focus may be on changing (or stable) practices, perceptions and orientations of actors and how these relate to certain events or situational, historical, and institutional circumstances (contexts) and possible changes in these circumstances. For instance, in social policy research, such as the studies Peter Dwyer and Ruth Patrick (2021) report on in this issue, researchers are often interested in how people deal with and adjust to a certain policy reform and how this reform may impact various aspects of their lives. Health research increasingly makes use of QLR to better understand how people deal with a certain disease or treatment (for example, [Kneck and Auduly, 2019](#)). Additionally,

QLR enables sensitivity to any changes in interpretations of the researcher (Lewis, 2007; Neale, 2018).

QLR can account not only for changes in practices and perceptions, but also for changes in how people look into their past and how plans, expectations and anticipation of the future change over time and over the course of certain events. In this regard, the contribution of Núria Sánchez-Mira and Laura Bernardi in this issue (2021) provides a helpful heuristic framework to capture different aspects of relative time that can be accounted for in QLR, in particular the multidirectional (such as backwards, forwards), telescopic (short-term, long-term, for instance) and elastic (different tempos and paces) nature of time.

QLR designs enable the researcher to compare prospective plans and retrospective evaluations of actors with regard to certain events, phases or transitions that occur during the time period covered by a QLR study, and to assess respective reinterpretations. Further, QLR allows the researcher to study changes in decision-making and changes in how people relate to personal, situational and institutional circumstances. This also includes how experiences accumulate over time, and how they might affect later orientations and actions ('shadow of the past') as well as how an individual's anticipation of the future, including expectations, specific time horizons and planning perspectives shape current actions and decision-making ('shadow of the future'), also accounting for non-linear forms of causality.

All these aspects make QLR especially interesting for life course research, which is concerned with time, timing, long-term patterns of stability and change over the life course (trajectories, turning points), the intersection of social context and biography, linked lives and human agency (Elder et al, 1996; cf. also Bidart, 2012; Bernardi et al, 2019).

## **Challenges and pitfalls of qualitative longitudinal research**

When planning a QLR study there are design decisions that may have far-reaching implications for the results that can be achieved. Most especially, the choices of the methods for data collection and data analysis, along with the sampling strategy, may strongly impact the comparisons that can be drawn between cases and across time, and thus the contributions a QLR study can make. With some notable exceptions (for example, Neale, 2018; Kneck and Audelv, 2018, and Vogl et al, 2018 on analytical strategies) these aspects are rarely covered in the literature so I will look at them in more detail.

### *What does 'qualitative' mean in 'qualitative longitudinal research'?*

When we speak of qualitative methods, we are referring to a broad and heterogeneous landscape. Among these methods are ethnographic approaches, different forms of observation, various interviewing techniques and the collection of documents or archival data. Furthermore, a host of methods are used for analysis that rest on various theoretical assumptions and methodological positions, such as symbolic interactionism, pragmatism, the sociology of knowledge, phenomenology, ethnomethodology and constructivism.

In principle, all these methods can be employed in a qualitative longitudinal study, but most often qualitative interviews are used (cf. Holland et al, 2006; Neale,

2018). As [Nevedal et al \(2019\)](#) write in their review of 71 QLR papers, very often researchers do not qualify the type of interviews that are employed in QLR, nor do they describe the instruments used (for example, topics covered, interview guideline, sample interview questions). Alas, there is quite a large variety of qualitative interview types. It seems obvious to say that the type of interview and how it is conducted can heavily impact the data collected. Further, together with the strategy used for data analysis, the interviewing method may have stark implications for the assertions that can be made on the basis of the collected data. As I want to argue, these aspects of research can have special bearing on the question of whether change or stability is determined over time – the very question that is of key interest in a QLR study. In the following section, I will focus on interview data, although several aspects also apply to other qualitative methods and data, such as observations or documents.

When researchers do qualify interviews, they often refer to them as ‘in-depth’, ‘semi-structured’, ‘thematic’ or ‘narrative’. However, without any further reference or information on how the interviews are conducted, this still leaves broad scope for interpretation. Is there an interview guide at all? How rigidly or flexibly is the guide adhered to? Are the interview guidelines and the handling of them able to elicit the perspectives of the interviewees – or are they actually tied closely to the perspectives of the researchers ([Ayalon et al, 2018](#))? Is there any standardisation across interviews with regard to topics or specific interview questions? If the interviews are referred to as ‘narratives’, what exactly does this mean? Does it refer to a specific methodology and data elicitation strategy, such as the ‘narrative interview’ ([Schütze, 2008a; 2008b](#)), which is probably the most open interview technique?

The ‘narrative interview’ as developed by Fritz Schütze ([2008a; 2008b](#)) starts out with a rather minimalistic prompt and the interviewees tell their history or describe single events in an unrestricted way, that is, as a spontaneous narrative told without any preparation. Follow-up questions elicit further narrations (‘tell me more’, ‘how did this happen?’) and in later parts of the interview, also descriptive and argumentative accounts focusing on reflexive knowledge of the interviewees. In German-speaking countries the narrative interview is the most common interview for collecting biographical data. It was developed in the 1970s, but its methodological foundations, as well as descriptions of narration analysis, have only recently been published in English ([Schütze, 2008a; 2008b](#)). Prior to this, this method was primarily known in the international arena through the translations and adaptations by [Rosenthal \(2006\)](#); [Wengraf \(2001\)](#), and [Witzel and Reiter \(2012\)](#). Compare also [Breckner and Rupp \(2002\)](#) and [Hollstein \(2019\)](#).

### *Implications of qualitative methods for determining stability and change*

Depending on the interview method and conduct, different types of data will result, each of which facilitates or limits different analytical strategies (see [Figure 1](#)). Following distinctions made by linguistic theory, one may differentiate between accounts that differ with respect to how strongly they are bound to current circumstances, such as the interview situation. For instance, reflexive accounts such as evaluations and argumentations are more strongly influenced by current and situational circumstances, such as the interaction with the interviewer ([Kallmeyer and Schütze, 1977](#); [Schütze, 2008a; 2008b](#)). In contrast, extempore narrations in which the interviewees tell their

**Figure 1:** Implications of qualitative methods for determining stability and change.

Data collection method (e.g. interviews)	Data (e.g. interview data)	Analytical strategy	Reality level	Stability across situations and over time
<b>Semi-structured interview</b> - handling tied closely to the perspectives of the researcher (e.g. rigidly following guideline)	<b>Answers that are less informative regarding perspective of interviewee</b>	<b>Descriptive methods</b> (e.g. Content Analysis) - describing <b>what</b> is expressed	<b>Explicit knowledge</b> - conscious - rather reflexive - rather bound to current circumstances	Rather <b>unstable</b> phenomena - e.g. opinions
<b>Guided interview</b> - allowing for more flexibility	<b>Subjective perspectives of the interviewees</b> - evaluations and argumentations (strongly influenced by the interview situation, and current circumstances)	<b>Interpretative methods</b> (e.g. Grounded Theory)	↕	↕
- allowing for much flexibility	- partly containing narrations (less bound to current circumstances)	<b>Reconstructive methods</b> (sequential analytical) - aiming at <b>how</b> participants deal with circumstances across different situations	<b>Implicit knowledge</b> - rather pre-reflexive - partly subconscious - less bound to current circumstances	Rather <b>stable</b> phenomena - e.g. patterns of decision-making, inner logic of action, agency
<b>Narrative interview</b>	<b>Narrations</b> - less bound to current circumstances			

history or describe single events in an unrestricted way, that is, as a spontaneous narrative told off the cuff and without any preparation, contain more pre-reflexive knowledge and are less bound to the current situation and closer to past experiences of the interviewee (Kallmeyer and Schütze, 1977; Schütze, 2008a; cf. Hollstein, 2019).

When analysed with sequential analytical reconstructive methods, such narrations, for instance, allow the reconstruction of tacit knowledge and orientations that guide an individual’s actions and that are partly subconscious (cf. Hollstein, 2019; Hollstein and Kumkar, forthcoming). Because of that, these methods offer unique avenues to understand biographical decision-making and the layers of biographical experiences and planning, to investigate how individuals link different spheres of life and to explore different types of agency (Hollstein, 2019; see lower part of Figure 1). For example, by means of narration analysis (Schütze, 2008a; 2008b), a method widely used to analyse biographical interviews in German-speaking countries and sometimes also referred to as biographic interpretive method (for example, Breckner and Rupp, 2002), Fritz Schütze (2008a; 2008b) reconstructed several types of elementary ‘biographical process structures’ that describe how people deal with external circumstances and how their ways of dealing with things change over the life course. For instance, ‘biographic action schemes’ are characterised by a high degree of autonomy, whereas ‘institutional expectation patterns’ characterise institutionally shaped and normatively defined courses, such as career trajectories within an organisation. In ‘trajectories of suffering’, people only react to overwhelming external events (Schütze, 2008a; 2008b).

In sharp contrast, more structured interviews in which the interviewer rigidly follows the interview guideline and does not allow for much flexibility – a conduct that has been coined in German as ‘guideline bureaucracy’ (*Leitfaden-Bürokratie*; Hopf, 1978) – result in rather short answers and/or reflexive accounts, leaving little room to articulate and reconstruct relevancies, perceptions and perspectives of the interviewees (upper part of Figure 1).

When interviews fall between these two categories and provide detailed qualitative data, which aspects of the interviewee’s knowledge and individual action can be addressed will depend on the analytical strategy (middle part of Figure 1). Here, three groups can be distinguished: first, descriptive methods such as qualitative content analysis that focus on the explicit knowledge and reflexive accounts of interviewees;

second, interpretative methods, like Grounded Theory, that also take into account the context of the individual's utterances and strive to identify certain patterns of behaviour and orientation across cases; third, the above-mentioned sequential analytical methods that are inherently case-oriented and aim to reconstruct tacit knowledge, habitus and the inner logic of individual action that is partly unconscious.

Thus, depending on the data collected and the strategies employed for data analysis, different layers of social reality and individual action are addressed. Depending on which of these levels are addressed, stability or change will be determined in QLR (see [Figure 1](#)). For example, the so-called biographical process structures reconstructed by Fritz Schütze (2008a; 2008b) are expected to represent rather long-term patterns (trajectories) that are guided by a specific type of agency, which might not be changed easily. On the other hand, content analytical descriptions of an interviewee's explicit knowledge and reflexive accounts (for example, evaluations) can be expected to be quite unstable and prone to change even within a short time-frame ([Tomanović, 2019](#), for example). In other words, the extent of stability and change (including what is considered a turning point) identified in QLR depends on, and might vary according to, the qualitative methods employed for data collection and data analysis.

In this regard there is definitely a need for clarification and better documentation in QLR – also with respect to what is considered as 'agency', 'motif', 'driving force' or 'biographical orientation', for which quite different and heterogeneous definitions and operationalisation can be found in the literature (for example, [Bidart, 2012](#); [Henderson et al, 2012](#); [Kohli, 2019](#); [Tomanović, 2019](#)).

### *Flexibility, comparability and standardisation: how to measure change (and stability) in QLR*

Flexibility with respect to the design and process of research is one of the strengths of qualitative research, ensuring that action patterns, perceptions or perspectives that are the focus of the study are addressed adequately. On the other hand, in QLR a certain amount of continuity of the research design is necessary in order to enable comparisons across cases and across time, that is, inter- and intra-individually, with the aim of accounting for both change and stability of the topic at hand.

This tension between change and continuity, between flexibility in the research design on the one hand and comparability of cases across time on the other hand, is fundamental to QLR and also a pertinent theme in the empirical papers of this special issue. Changes in the research design, such as integration of new or modified interview questions or new methods, can occur on various levels and for several reasons, such as after certain life transitions of participants ([Vogl and Zartler, 2021](#)), when new insights were gained from previous waves of data collection ([Dwyer and Patrick, 2021](#); [Vogl and Zartler, 2021](#)), or when newly developed methods were integrated into the study ([Vogl and Zartler, 2021](#)). Researchers also have to deal with unexpected changes, such as discontinuity of interviewers ([Vogl and Zartler, 2021](#)), posing additional challenges in the management of research and research data.

Despite the changes and plasticity inherent in QLR, the methods and research designs must also allow comparisons across time and participants. This key challenge of QLR has to be addressed on the level of study design, as well as with regard to the qualitative methods and instruments employed in the study.

With respect to study design, the time frame and timing of waves of data collection must ensure recognition of change and stability where expected (Ayalon et al, 2018). This concerns the overall time period covered by the study, the timing of the waves, their frequency and the intervals between them (cf. Nevedal et al, 2019). Here, universal rules are impossible, since all these aspects depend on the research questions and the specific topic of the study. If relatively rapid change is expected, such as dealings with new official orders during the Covid-19 pandemic or changes in everyday life after the birth of a first child, shorter intervals between waves of data collection might be more effective. If transitions of long duration are the core interest, for instance when studying social integration after migration or network changes following the death of the spouse, probably several observations and encounters with participants would be recommended. If policy interventions, evaluations and experiment-like situations are studied, observations before, during and after the implementation of the reform are ideal (for example, Dwyer and Patrick, 2021). In any case, all these decisions regarding the time frame and timing of waves of data gathering impact how much stability and change will be detected.

With respect to the methods and instruments employed in the study, some sort of standardisation is necessary in order to account for changes or stability over time. This can be accomplished in various ways depending on the respective methods and the research design.

In semi-structured interviews and those with an interview guideline, some standardisation is already established, be it through coverage of certain topics or themes across all interviews or by means of specific interview questions. Susanne Vogl and Ulrike Zartler (2021) demonstrate that even very open interview techniques can easily be complemented by follow-up prompts covering certain topics or questions that allow for comparisons across cases and time. Similarly, in a project on practices and biographical orientations in the German middle class, biographical-narrative interviews were combined with several follow-up prompts, ensuring that various spheres of life were addressed systematically across all study participants. With the same purpose a short questionnaire on socio-demographic data complemented the interview (Hollstein, 2019).

It should be noted that even very unstandardised data, such as narrative data, may permit comparisons, though on a rather abstract level. The ‘biographic process structures’ reconstructed by Fritz Schütze (2008a; 2008b) are a good example in point. However, such comparisons require laborious interpretative methods, such as Grounded Theory or the already-mentioned sequential analytical methods, which come with the downside that usually only a small number of cases can be analysed.

Sometimes the sheer size of a project compels standardisation. As Dwyer and Patrick (2021) report, the 480 cases and seven research groups in one of their studies required a ‘“top down” common coding schema was developed to enable a systematic and structured approach to data management’. This trade-off between sample size and depth of analysis also holds true in the other direction, of course: elaborate sequential analytical methods that allow for the reconstruction of habitus, agency and inner logic of action can only be applied to a small, manageable sample.

### *Sampling and explanatory power of qualitative longitudinal research*

A key challenge of qualitative research is that of providing evidence and formulating general statements about fields of action that go beyond mere illustrations by means of interview quotes. One possibility that qualitative case studies offer is to systematically compare different cases and to then discover plausible (meaningful) links between action patterns and conditions surrounding them, such as socio-demographic conditions and the historical, cultural or institutional context. However, the careful consideration of sample composition and the selection of cases are crucial here, aspects often underestimated in qualitative studies.

All this is also true for QLR designs, but under even more difficult conditions. In particular, the most powerful sampling strategy employed in qualitative research, that of theoretical sampling developed in the context of Grounded Theory, can only be applied with restrictions because cases that will be added over the course of the study lack – at least in part – the longitudinal component.

As Stacy Carter put it, ‘longitudinal designs may diminish a study’s explanatory power by making samples less purposive: commitments to long engagement must be honoured, and the participants selected may, over time, become less informative than expected about the issues under study’ (Carter, 2006: 2).

In particular, sample attrition, a topic addressed in several papers of this special issue, can severely affect the results, contributions and explanatory power of QLR. Vogl and Zartler (2021) describe several strategies to avoid sample attrition in their study of less-educated young adults, a group that often poses special challenges for researchers. Interestingly, the unexpected discontinuity of interviewers did not appear to cause sample attrition since respondents seemed to be committed to the project rather than to the individual interviewers.

Dwyer and Patrick (2021) made use of oversampling, a strategy against sample attrition that works only if employed at the very start of a QLR study. The authors started one of their studies with 480 instead of 400 participants. Another strategy some researchers recommend is to add cases along the way (for example, Neale, 2018). This strategy also allows for the employment of some sort of theoretical sampling, but of course allows inferences concerning processes only on the basis of cases that are subject to at least two waves of data collection; thus it works only in longitudinal studies with at least three waves. Oversampling and injecting new generations of respondents over time are also basic strategies in quantitative panels to deal with attrition and selective dropout. However, in QLR these strategies do not aim to accomplish representativity, but to maintain or achieve heterogeneity of situations, practices and perspectives in order to be effective in capturing the many facets of the process under study.

A different strategy that may enhance the explanatory power and generalisability of results is to link a qualitative sample to a larger representative study. In some cases, the qualitative inquiry is meant to deepen and further elucidate the results obtained by the quantitative study, as described by Nicolas Legewie and Ingrid Tucci (2021). The quantitative study can also lay the groundwork for selecting and locating cases to be examined more closely by qualitative means (so-called ‘mapping’), a strategy we applied in the study, mentioned earlier, on conduct of living and practices in the German middle class (Hollstein, 2019). Such a case selection can be guided by quite different criteria; for instance, one can further investigate extreme cases, outliers or emblematic cases. In that study we selected the qualitative sample out of



a large representative survey on the basis of different combinations of economic and cultural capital, a strategy that enabled us to systematically relate resources, practices and occupational orientations.

Such links between qualitative and quantitative studies can provide interesting opportunities to compensate for the respective weaknesses of each of the paradigms. This applies all the more to longitudinal mixed-methods studies that combine longitudinal components of both strands. But this would be another story.

## Conclusions

In this commentary to the special issue ‘Prospective Qualitative Analyses: New Directions, Opportunities and Challenges’, I focused on promises and pitfalls of QLR. Longitudinal data on practices, perspectives, individual relevancies and experiences can be particularly advantageous for life course, social policy, and health research, as well as many other fields of research, such as migration or family research (for example, [Bernardi, forthcoming](#)). However, the complexity of QLR carries certain downsides, dilemmas and trade-offs. In this contribution I discussed the implications of different qualitative methods for the investigation of stability and change, the tensions between flexibility and comparability, and challenges related to sampling and the explanatory power of QLR.

I have argued that the choice of specific qualitative methods for data collection together with the methods employed for data analysis – descriptive, interpretive or reconstructive methods – have stark implications for what can be determined as change or stability across time. Further, comparisons across time require some sort of standardisation, though this can be accomplished through different means, depending on the specific research methods and design. Finally, the longitudinal component may heavily impact the explanatory power of a QLR study. In this regard, sampling strategies aiming to achieve and maintain heterogeneity appear to be a *sine qua non*.

[Nevedal and colleagues \(2019\)](#) noted that QLR studies often do not explicitly specify the methods used. As I have argued, the selected methods can strongly affect what is identified as change or stability, which is the core interest of QLR. Considering this, there is definitely a need for more thorough documentation of the methods of data collection, sampling and analytical strategies used in these studies, along with a better description of instruments and how they are applied as standards of good practice.

Following individuals over time and grasping rich and fine-grained data about their practices, perceptions and perspectives is an exciting and engaging endeavour that promises important findings concerning substantive issues in life course research, social policy, and health research. Additionally, QLR can produce novel theoretical and methodological insights. For instance, gaining a better understanding about changes in decision-making across the life course and about the accumulation of experience and changes in anticipation and planning can be expected also to inform and inspire the advancement of life course theory. Furthermore, contrasting prospective and retrospective qualitative data can produce basic insights, for instance about the functioning of memory and the conditions affecting the validity of retrospective data. In this regard, QLR not only offers interesting links for cooperation between qualitative and quantitative researchers – as demonstrated by [Legewie and Tucci \(2021\)](#) – but also for stimulating interdisciplinary exchange between social sciences and cognitive and neuroscience.

## Acknowledgements

For helpful comments on earlier versions of this commentary, I am grateful to Laura Bernardi, Jeylan Mortimer and Heather Joshi.

## Conflict of interest

The author declares that there is no conflict of interest.

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