



Economic and Social Data Service

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Economic and Social Data Service  
Annual Report 2003-2004



# Economic and Social Data Service

## Annual Report 2003-2004

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# Introduction

This is the first full Annual Report of the Economic and Social Data Service (ESDS). The service was established in January 2003 as part of a joint vision shared between the Economic and Social Research Council (ESRC) and the Joint Information Systems Committee (JISC) for developing high quality resources to underpin social science research and learning within the UK Higher and Further education sectors: a vision which includes facilitating resource discovery, data enhancement, user support and providing access to data collections over time through archive facilities. Within the ESRC, responsibility for developing research resources rests with the Research Resources Board (RRB), and the establishment of ESDS can be seen as being central to the RRB's broader strategy of maintaining the long-term vitality of the UK social science infrastructure, in particular by providing the social science community with an accessible and comprehensive data service empowering end users to locate, request, retrieve and exploit data resources in a simple, seamless and cost-effective way.

In its recently reformulated strategic plan the ESRC has identified four priority categories that will inform and drive its future funding decisions:

- **Capacity** – to build sufficient capacity for the UK to undertake top class social science;
- **Research** – to fund only cutting-edge and excellent research that focuses on pushing back the frontiers of science and on areas of major national importance;
- **Engagement** – to communicate its research findings as widely as possible; to engage with its audiences and to get its research into practice;
- **Performance** – to perform its work as efficiently and effectively as possible to deliver world class social science research.

In the light of this new strategic thinking, and in relation to the stated JISC vision for "ubiquitous and reliable access to an information and communication environment, so that users are able to enjoy world-class technologies in support of their work and study", the ESDS has developed its own Strategic Plan that is best summarised by the over-arching mission statement which sets out a vision of supporting high quality research, teaching, and learning in the social sciences through a series of six key strategic activity areas.

*To support **high quality research, teaching, and learning in the social sciences** by **acquiring, developing and managing** social and economic data and related digital resources; and by **promoting, disseminating and supporting** the use of these resources as **effectively as possible**.*

To achieve this, ESDS must be embedded within its community and ensure that the services it offers, the data it acquires, the advice and support it provides, are all timely, up to date, and relevant to the needs of UK social science, now and in the future. Capacity building is an important part of this mission, building data literacy by enabling the training of students, tomorrow's data users both within academia and beyond. Accountability and transparency are also key, and every aspect of the service must be under continuous scrutiny to ensure that resources are being invested wisely, carefully, and where they will yield best results for its users.

Once having read the Report on the year's activities which follows this introduction, I hope you will agree that although still a young and developing service, the ESDS is well on the way to achieving its strategic goals.

Professor K. Schürer,  
Director, ESDS

# Background

The Economic and Social Data Service (ESDS) is a national data service that came into operation in January 2003. ESDS provides access and support for an extensive range of key economic and social data, both quantitative and qualitative, spanning many disciplines and themes.

ESDS is a distributed service, based on a collaboration between four key centres of expertise: UK Data Archive (UKDA), Institute for Social and Economic Research (ISER), both based at the University of Essex; Manchester Information and Associated Services (MIMAS) and Cathie Marsh Centre for Census and Survey Research (CCSR), both located at the University of Manchester.

ESDS comprises six distinct yet inter-related functions:

**ESDS Management** – The overall direction and management for ESDS is the responsibility of the UKDA. Through this function, the UKDA provides consistency and standards across the service. It performs a broad strategic role, relating to a variety of stakeholders concerned with the supply, funding and use of social science data, and seeks to create a coherent publicity, promotion and outreach strategy for the whole service.

**ESDS Access and Preservation** – Also hosted by the UKDA, this function represents the core of the ESDS, focusing on the central activities of data acquisition, processing, preservation and dissemination, providing access to most of the data held by ESDS through a variety of web-based systems. The function also handles registration of users centrally across ESDS.

**ESDS Government** - The service, led by CCSR with support from the UKDA, promotes and facilitates increased and more effective use of large-scale government surveys in research, learning and teaching. This includes methodological guides, short courses and support for key statistical packages. The service will also work closely with data producers and users to maximise the synergy between these groups.

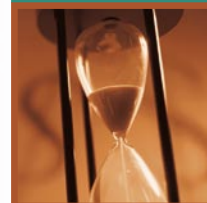
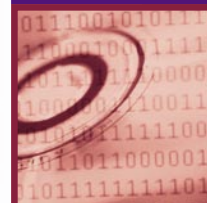
**ESDS International** - This function provides access to, and support for, a range of international datasets – both macro and micro sources. The central aims of the function are to promote and facilitate increased and more effective use of international datasets in research, learning and teaching across a range of disciplines. The function is led by MIMAS at Manchester, with support from the UKDA.

**ESDS Longitudinal** - The work of ESDS Longitudinal is undertaken jointly by the UKDA and the UK Longitudinal Studies Centre (ULSC), based at the Institute for Social and Economic Research (ISER). The function supports a range of longitudinal data collections by: creating data enhancements; providing user support and training; and promoting the increased use of longitudinal data.

**ESDS Qualidata** - This specialist function provides access to, and support for, a range of qualitative datasets, and is hosted by the UKDA. The function is responsible for generating a number of data enhancements, and for providing information and training resources that focus on strategies for re-analysing qualitative data.

Further details on the activities of these individual functions can be found on the ESDS web site at [www.esds.ac.uk](http://www.esds.ac.uk).

This report covers all six functions, and for brevity includes a combined set of performance statistics.



# Highlights

This has been a year of substantial growth, with more datasets being acquired, more users being registered, more datasets being delivered, more queries being answered, and more visitors to our web sites than in any year of social science data services prior to the Economic and Social Data Service.

The twelve months under review have been so busy that it is difficult to provide a summary that adequately conveys the level and variety of activities that have taken place. Following the first seven months of the new service, which primarily witnessed the establishment of a basic infrastructure and framework for ESDS, this reporting period has been very much a time for maturing the service: building on the skeleton constructed during the initial phase of development.

Detailed statistics of ESDS activity are presented near the end of this report. In addition to increasing volume of business by every measure, ESDS has managed over the past year to significantly develop and improve its service infrastructure.

One area in which important developments have taken place has been in the construction of internal systems, essentially building the ESDS administrative back-end system. This is largely invisible to end users yet is critical to the smooth functioning of the service. This work was largely undertaken by ESDS Management and further details are in the next section of this report. Two significant developments have been the construction of a completely new ESDS web site and a one-stop-shop registration system. Using the Athens authentication system enables users to register to use ESDS quickly and simply online, and once registered, order data seamlessly regardless of where the data are located within the distributed environment.

Improvements to online delivery systems have also been implemented, with the launch in June of the Nesstar WebView service, markedly improving the functionality of the Nesstar data browsing tools. In July ESDS International's improved CommonGIS visualisation tools were launched, and expanded to include the Central Intelligence Agency (CIA) World Factbook data.

In order to promote and raise user awareness about the new service over the course of the year much effort has been placed on organising, and contributing to, a number of meetings, training events, seminars and workshops.

While some of these events, due to the audience in question, focused on one or other of the specialist services of ESDS, all provided general contextual information on ESDS and its component parts.

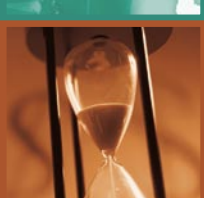
ESDS Management has organised and contributed to a number of awareness-raising events. Of particular note was the service-wide Awareness Day held at the Royal Statistical Society in London in December. This attracted over 75 delegates and also served as the inaugural ESDS local representatives meeting.

Other highly successful events have included: a research conference, organised by ESDS Government, on the theme of social and demographic change, and attended by over 60 participants, mainly from Government departments; the first Health Surveys User Group meeting at the Department of Health in January; and the ESDS Qualidata conference, 'Online Access to Qualitative Data: Opportunities and Challenges', held in London in January.

Promotional materials have been distributed at many events. ESDS events and services have been advertised widely including through JISCmail lists and ESDS web pages.

A further strand of ESDS activity to highlight is the continued acquisition of new data collections. Obviously ESDS largely depends on the supply of quality data materials for the communities that it serves. Since its establishment, ESDS Access and Preservation has acquired, in addition to core and longitudinal data materials, a total of 34 government datasets (excluding new editions). This figure is some 80 per cent above the targets originally set by funders.

The development of the ESDS International data portfolio has expanded considerably over the course of this reporting year with the addition of a number of key international macro databanks. This has resulted from negotiations with a number of Inter Government Organisations, for whom, in some instances, it is the first time that they have consented to countrywide data redistribution agreements for academic access to their data. Further details are provided in the ESDS International section within this report.



# Management

## ESDS Management

*supporting high quality research, teaching, and learning in the social sciences by acquiring, developing and managing social and economic data and related digital resources; and by promoting, disseminating, and supporting the use of these resources as effectively as possible*

Most of the overall direction and management for ESDS lies with ESDS Management. The function also provides and develops much of the technical backbone for the service, and in this sense much of the work of the function is hidden from the user community that it seeks to serve. ESDS Management also provides a supporting and co-ordinating role for the publicity, promotion and outreach activities for the whole service.

### Strategic direction and management

As a national service with activities and staff distributed across four institutions (CCSR, ISER, MIMAS and UKDA) the central management and planning of ESDS is critical to providing, from the user perspective, a unified, seamless and integrated service. To this end ESDS Management have built on the internal operational infrastructure established during the first phase of the service in order to provide effective communication and reporting mechanisms for the service as a whole. For example, cross-function management reporting and planning meetings are conducted by video conference every two months, and a number of cross-function working groups, such as web development, are convened to ensure the adoption of common standards and convergence of working practices and effort across disparate teams.

It is also clearly important to achieve as much convergence as possible between ESDS and other ESRC/JISC investments as well as other related service providers and stakeholders. Allied to this need, a series of meetings have been held with members of the Centre for Applied Social Surveys (CASS) Question Bank (QB) staff and a joint approach to acquiring materials from government departments has been mapped out and is in operation. Equally, regular meetings are held with Office for National Statistics (ONS), the National Assembly for Wales, the Scottish Executive and the Northern Ireland Statistics and Research Agency (NISRA) to discuss data supply and quality. At an international level, strategic meetings are also held with Inter-University Consortium for Political and Social Research (ICPSR), the nearest equivalent to ESDS in the USA; and Council of European Social Science Data Archives (CESSDA), the body that federates data archives across Europe. In relation to the latter, the UKDA, on behalf of ESDS, has been instrumental in drawing up a new Trans-Border Access Agreement that will provide mechanisms for the easier exchange of data between countries.

ESDS Management also provides an important reporting function for the service. In addition to collating and submitting the ESDS Quarterly Reports to ESRC/JISC it also produces supporting papers for the ESRC Troika meetings and ESDS Advisory Committee, both of which meet on a bi-annual basis. Over the past year extensive negotiations have taken place with the JISC Monitoring Unit (MU) to agree a common service-wide Service Level Definition (SLD). This was finally agreed by all parties and signed off in February 2004. In line with this, throughout the year ESDS Management has co-ordinated and compiled quarterly SLD statistics for ESDS and submitted these to the JISC MU. A digest of these is provided in the statistical pages of this report, and full returns are available from [www.esds.ac.uk/news/jiscmu.asp](http://www.esds.ac.uk/news/jiscmu.asp).

A further important achievement has been the completion of the ESDS Strategic Plan. This has been specially written to parallel the ESRC Research Resources Board (RRB) strategic plan and the relevant JISC strategic documents. The text of the ESDS Strategic Plan is online at [www.esds.ac.uk/news/publications.asp](http://www.esds.ac.uk/news/publications.asp) and printed copies are available upon request.



[www.esds.ac.uk](http://www.esds.ac.uk)



## Technical infrastructure

A major achievement during this reporting period has been the complete re-vamping of the process by which users register and order data. This is embodied in the ESDS one-stop registration system. The new system was launched as part of the second ESRC Social Science week (21 June) and was an extension and enhancement of the initial registration system developed for ESDS International in June 2003. The new system allows registered users access to all ESDS data services through a one-stop Athens Single Sign On. This means that users only need to enter their personal Athens username once to gain subsequent access to all ESDS services. Users at institutions with Athens devolved authentication are also able to use their local network login. Registration for ESDS is now a one-off procedure and allows ESDS to identify users with previous UKDA accounts, so that ongoing and past dataset orders are not lost. Users within UK higher and further education who register with ESDS will also be entitled to access census data via the Census Registration Service (CRS) and vice versa.

As an adjunct to the registration system, a new ordering system now enables online procedures such as: acceptance of special conditions for dataset usage; the checking of dataset access conditions against user type; requests for dataset availability for download; and calculation of charges together with production of invoices for commercial orders or, where applicable, media and handling charges. In the new joint system there is no distinction between ordering and download, just the concept of adding datasets to personalised web pages, where the method of dissemination, (download, CD) can be selected. The new system still collects information on reasons for use (important to both data depositors and funders) and implements an access control. However, this process is now much simpler and the categorisation of subject area has been standardised so that specialist type services can be offered such as: targeted mailings on new data releases, dedicated workshops and training.

An initial version of the ESDS web site was launched in early 2003. Since this date a significant amount of new content has been added together with improved navigational aids. Work has also taken place to rationalise, harmonise and improve interoperability between the previous existing UKDA site and the ESDS site.

## Promotion

Over the year a total of over 100 events have been organised or contributed to. These have taken the form of general awareness raising about ESDS, workshops focusing on specific themes or datasets, or training on methodology relating to the use of ESDS-held data. Most of these events are listed in the Diary section of this report. Although it is not

practical to report on each of these events, it is gratifying to highlight the success of the service-wide Awareness Day held at the Royal Statistical Society in London in December. This attracted over 75 delegates and also served as the inaugural ESDS local representatives meeting. A follow-up Awareness Day was held in Belfast in February, and a related Hands-On ESDS workshop was held in Edinburgh in April.

All of the ESDS specialist functions, together with ESDS Management, continue to work hard to promote ESDS through a series of outreach events, in the form of general awareness sessions, as well as more specialist or focused training workshops.

It is worth highlighting the five ESDS events held in conjunction with the second ESRC Social Science Week (21-25 June): a general ESDS Awareness Day held in Cambridge; Introducing the UK Cohort and Birth Studies (ESDS Longitudinal); Using Government Surveys for Research (ESDS Government); Analysing Hierarchical Surveys (ESDS Government); and Secondary Analysis of Qualitative Data (ESDS Qualidata).

ESDS also contributed to the highly successful ESRC Research Methods Festival, Oxford (July 2004) by giving a number of sessions and poster displays. ESDS held a drop-in session on ESDS services, sessions on longitudinal and government data, and presentations on secondary analysis of qualitative data and international comparative hierarchical data.

An important vehicle for communicating with users and stakeholders is the ESDS newsletter, *UK Databytes*. Over the reporting year four issues of the newsletter have been produced (September, December, March and June) with a circulation list of approximately 2,750.





# Access

## ESDS Access and Preservation

*focusing on data acquisition, processing, preservation and dissemination*

### Advice to data creators

One of the functions of ESDS Access and Preservation is to provide guidance to those creating data collections and those, especially ESRC award holders, preparing data for deposit. To facilitate this in April 2004 a completely revised suite of Create and Deposit pages were launched. These provide a unified source of advice and guidance on the creation and deposit of quantitative and qualitative data, covering: specific advice for ESRC award applicants and award holders; enquiries about research management and documentation, preparing and submitting data; ethical and legal considerations (copyright and intellectual property rights (IPR), data protection, confidentiality and consent).

In relation to the process of depositing data, a programme of work has been carried out developing new procedures for acquisitions including a much-improved in-house database recording information about depositing data and including, negotiations for data collections; electronic deposit forms and a new depositor licence.

The rationale for developing electronic Data Collection Deposit Forms is to ease and streamline the process from the depositor perspective and to provide the ESDS with more consistent, machine-ready information for cataloguing purposes. This presentation is currently undergoing further testing within ESDS and will be released for use next year.

### Internal systems

An important element of the work of ESDS Access and Preservation is to undertake the core processing of all the newly-acquired data collections (except macro international data ingested by ESDS International) including the generation of associated catalogue records and supporting metadata. In this regard a significant amount of the work of the section takes place 'behind the scenes'. This is especially true of the development work to improve internal systems for the processing or through-put of data and metadata. During this year, for example, a complete new suite of input programs for generating catalogue records has been implemented. These now automatically generate a set of metadata (with citation, disclaimer, titlepage, readfile and access information) during data processing. These will greatly speed the process and improve the quality of cataloguing. Equally, work has been undertaken to design and implement a new data processing tracking database, which will directly feed into the production of metadata, thus creating further efficiencies in the processes of preparing data for release to users.

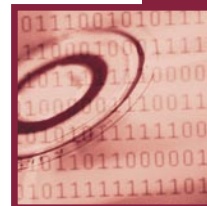
### Access to data

ESDS Access and Preservation processes orders and disseminates all data for all specialist functions aside from international macro data. ESDS is dedicated to providing easy online access to as many of its data holdings as resources allow. A number of data delivery and dissemination interfaces are made available depending on the type of data and user demand (Beyond 20/20, Nesstar, and Download), all of which are accessible from ESDS web pages.

In June 2004, as part of its commitment to improve online data access for users, a new version of the Nesstar software (WebView) was implemented. This incorporated significant improvements to the look and feel and ease-of-use of the interface. This version also improved the overall stability of the software and the tools used to publish the data. A major change was that applets were removed so that all data exploration now occurs in a centralised frameset with no pop-ups and easier navigation. Also, instead of being presented with a list of datasets, data are now organised into a series of easy-to-browse folders and sub-folders grouped by data series, UK geographic focus and teaching datasets.



By the end of this reporting year there were some 100 studies available in Nesstar including just under 50 large-scale ESDS Government and two ESDS Longitudinal datasets. All new deposits from the following data series are now routinely prepared for and published to Nesstar: Quarterly Labour Force Survey (including Household Datasets); Office for National Statistics (ONS) Omnibus Survey; General Household Survey; British Social Attitudes Survey; Scottish Social Attitudes Survey; Scottish Household Survey; British Election Study (cross-section data only); Northern Ireland Life and Times Survey/Young Life and Times Survey; Welsh Election Study (Wales Life and Times Study); and teaching datasets. The teaching datasets currently include British Crime Survey and Labour Force Survey data.

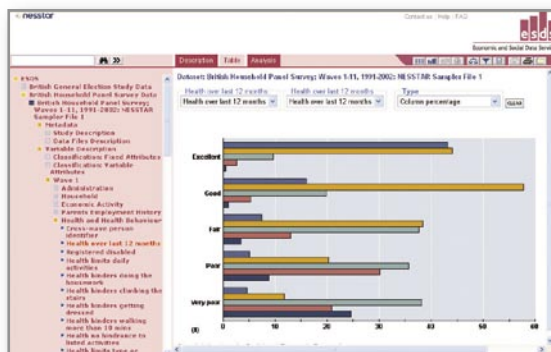


www.esds.ac.uk/aandp

In addition to the improved online data browsing provided by the new version of Nesstar, and as part of the improvements made to the one-stop-shop registration system (see report under ESDS Management), a new streamlined UKDA/ESDS ordering system and personalised web pages of requested datasets was officially launched during Social Science Week (June 2004). Social Science Week also saw the launch of a new, more sophisticated download access control system, which checks dataset access conditions against user type and intended use. This system, together with online agreement to special conditions, means that datasets that were previously unavailable for download can now be made available in this way.

## Preservation

ESDS Access and Preservation provides a data preservation facility across the whole of ESDS. During this year the section has commissioned and put into operation a larger preservation front-end server to cater for the expected increase in holdings over the existing period of the ESDS contract. The old system catered for approximately 500 gigabytes, while the new system has capacity for 1500 gigabytes with easy add-on expansion capacity for another 3000 gigabytes.



In May the UKDA, which houses the ESDS preservation facility, was inspected by a team from The National Archives (TNA). The outcome of this site visit is that the UKDA will be designated as a legal place of deposit for certain classes of government electronic records. The accordence of this status marks official recognition of the quality of work done in this area and the adherence to national standards. The UKDA is the first such dedicated data archive to be given this status in the UK.

## Acquisition

ESDS Access and Preservation acquires data from data producers across the whole range of ESDS activities (with the exception of macro international data collections accessioned by ESDS International). Over the year a total of 271 data collections, including new editions and updates, have been acquired for ESDS, including a total of 138 government, 61 core, 57 international, twelve qualitative, and three longitudinal data collections. ESDS also delivered 538 datasets from sister archives on behalf of its users through its international data exchange agreements.

### CASE STUDY



Much social science is about change. Society has supposedly become more individualised. Social class has apparently become less important in people's lives. Voters have seemingly become more apathetic. But researchers who wish to analyse such propositions face a problem. While they can conduct a survey to establish how individualised or apathetic people are now, or how important social class is in contemporary life, doing so does not prove that things have changed. They might try comparing older people and younger people. But perhaps people change as they get older. They can ask respondents about their attitudes and behaviours in the past. But memory is notoriously fallible.

A much better approach is to include on a contemporary survey questions that were asked on surveys many years ago. Then we can compare today's survey with that of yesteryear and establish whether change really has taken place. But where is the researcher to find out what questions were asked on previous surveys, and the answers they obtained? In the archive of course.

While co-director of the British Election Study between 1983 and 1997, I and my colleagues wanted to test whether there really had been a long-term secular decline in the relationship between class and vote. We did so by comparing the results of our surveys with that of previous election studies deposited in the archive. Our work led to a debate that still continues!

Currently we are milking the archive's resources once more. As part of the ESRC Identities programme, we want to test whether identities have changed. So we are looking at the archive's holdings of surveys done in the 1960s to see what we can replicate forty years on. Without the archive such research would be nigh impossible.

Professor John Curtice, *University of Strathclyde*

# Government

## ESDS Government

*facilitating more effective use of large-scale government surveys*

The large-scale government surveys provide a key resource for UK social science. ESDS Government promotes and facilitates increased and more effective use of surveys such as the General Household Survey (GHS), the Labour Force Survey (LFS) and the Health Survey for England (HSE). ESDS Government has an annual theme around which resources are developed and workshops organised.

### Awareness raising and training

Whilst the government surveys are very heavily used, there remains scope to expand their use in research and learning and teaching and to bring them to the attention of new groups. Workshops, talks and poster sessions all complement the information posted on the ESDS Government web site. The 2004 Research Methods Festival, attended by over 600 delegates, provided a number of opportunities to promote the government surveys, including displays, drop-in sessions and a session on secondary analysis for PhD students.

Web-based resources are also important and topic-based guides help users find the best survey for their research area and find further resources using hyperlinks. The first two guides are Employment and the labour market: Introductory user guide, and Introductory guide to using the large-scale government surveys for health research - reflecting the themes for the first two years. For each survey there are 'Starting analysis' web pages designed for new users as well as introductory guides to using the main statistical analysis packages. To facilitate use of the key surveys in teaching and for MSc or undergraduate dissertations teaching datasets have been developed for the Labour Force Survey, the British Crime Survey and the Health Survey for England.

Addressing the perplexing question of when and how to apply weights with survey data is of central importance and one that causes users considerable confusion. A one-day meeting, held in March, was attended by 130 people and a Guide to Weighting with the Government Surveys has been developed based around the presentations. As with all resources this is freely available on the ESDS web site.

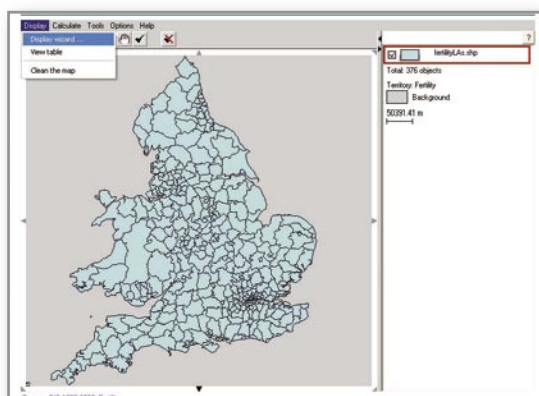
### Extending and enhancing data

The large-scale government surveys are very complex and navigating through the documentation is not easy. To facilitate this look-up tables are being created to, for example, allow mapping between the 2001 census and the GHS and LFS. User consultation has shown that the lack of consistency in question wording over time is a major problem and, in some cases, cannot be resolved. Mapping to show consistency over time and the code to derive consistent variables, where possible, is being added to the web site. This builds heavily on a large number of derived variables that have been provided by Jane Roberts (Nuffield College, Oxford) and reflects a strategic decision to capitalize on existing work and expertise.

There is an important series of vital events datasets with sub-regional geographies which is very under-used. An interactive web-based visualisation interface has been completed using Office for National Statistics (ONS) 2001 fertility and mortality data at Local Area (LA) level. The interface will be applied to other data collections over the coming year.

### Research publications

ESDS Government has led the development of a publications database. Thompsons Inc., the proprietors of the Web of Science, have agreed to references to publications held by the Web of Science and which use key government surveys, to be copied and moved into a searchable web-based database. This online database can be searched by author or keyword. It will be extended over time to include other publications databases. It is also planned to extend the database publications relevant to other ESDS services.

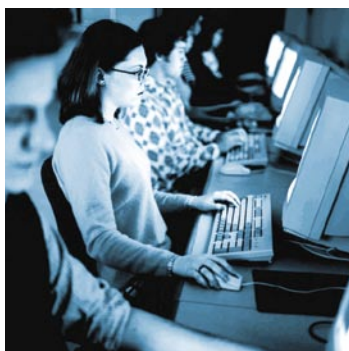


## Promoting an interchange with producers and funders

ESDS Government works closely with the Office for National Statistics and other data producers to maximize the complementarity of interest between producers, commissioning government departments and users. To facilitate this a number of user groups have been started. These have been very enthusiastically received and user group meetings have now become annual events for a number of key surveys (e.g. LFS and the Health Surveys).

The first Health Surveys User Group meeting was held at the Department of Health in January 2004 and a summary of the day is available online, along with all the presentations. An LFS User Group meeting was held in October 2003 – again presentations and papers are available online – and the second meeting will be in November 2004. At these events producers can explain new developments and consult users, and users can provide feedback on the research value of the surveys and suggestions for improvements.

An annual research conference, aimed at policy-makers and analysts, provides a show-case for some of the best and most policy-relevant research using government surveys. The 2003 conference was on social and demographic change over recent decades – and highlighted the research value of surveys that have now been running for 30 years or more. Some key results are shown in the 'Research conference' box. The 2004 research conference focuses on coronary heart disease and its correlates.



## RESEARCH CONFERENCE

The ESDS Government 2003 Research Conference provided insights into demographic and social change over recent decades based on analysis of large-scale government surveys. These included:

*James Nazroo, University College London: an ageing population*

- the number of elderly people (those aged 65 and older) has increased more than threefold since 1950 and continues to accelerate;
- labour force participation among these elderly men and women has steadily decreased since the 1960s;
- older people in low occupational classes are more likely than those in higher occupational classes to suffer from poor general health, mental health, physical performance and disability.

*Jay Ginn, University of Surrey: pension coverage*

- private and occupational pension coverage is highest for the white ethnic groups and lowest for the Bangladeshi group;
- minority ethnic groups are likely to continue to be disproportionately dependent on means-tested benefits in later life, due to their low private pension coverage and the policy of shifting pension provision towards the private sector.

*Deborah Price and Jay Ginn, University of Surrey: gender-based pension inequalities*

- 75 per cent of men compared with 40 per cent of women aged over 65 have some private pension receipt;
- 40 per cent of women aged 20-59 will not be entitled to state pensions because they are not in paid work or they are earning too little;
- motherhood impacts heavily on earnings and participation in private pension schemes with lone mothers particularly disadvantaged.

*Mike Murphy, London School of Economics: care for the elderly in the future?*

- fertility change and mortality improvement have led to an increase in the probability of elderly women having a living child over recent decades;
- the proportion of women aged 80 or over with one or more living children will increase for at least two decades and will be higher in 2040 than today.

Extended papers of these and other presentations are available on: [www.ccsr.ac.uk/esds/events/2003-12-01/slides.shtml](http://www.ccsr.ac.uk/esds/events/2003-12-01/slides.shtml)

# International

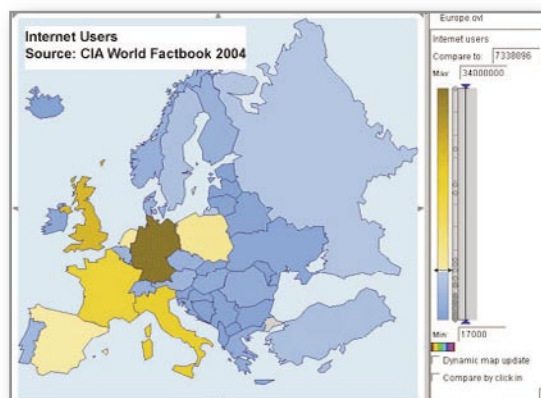
## ESDS International

*providing access and support for a range of international macro and micro data sources*

### Building a new user community

With the establishment of ESDS in 2003 one of the many exciting new developments was the prospect of acquiring a number of international comparative macro data collections which had not previously been available to the UK academic community, and which would complement the existing collection of international micro data. Thus, in addition to acquiring and providing access to new data resources, an important part of the work of ESDS International in its initial phase of development was to build a new user community. This is a task that has met with great success.

Since the official launch of the service in June 2003 until the end of the period covered by this report, a cumulative total of 1,873 users from 135 institutions had accessed the macro datasets hosted by ESDS International.



The 1000th user was logged in March 2004. This is particularly impressive given the relative short time that the service has been in operation, and would indicate there is demand for these types of macro international data across the whole of the community. The negotiation of UK-wide academic redistribution agreements, provision of a common user interface and a simple to use Athens-based registration system have removed significant barriers to use.

### Enhancement of the data portfolio

A major achievement over this year has been the development of the ESDS International data portfolio. ESDS International provides users with micro data through the UK Data Archive at Essex, such as the important EuroBarometer series of surveys and the World Value Surveys, and macro data via Manchester Information and Associated Services (MiMAS) at Manchester. Building up a major and sizable

collection of international macro data has involved the brokering of data redistribution agreements with a number of Inter Government Organisations (IGOs) in order to provide for UK-wide academic access to their databases. It is estimated that by the end of 2003, ESDS International had secured access to over £5,000,000 worth of data for a five-year period for approximately £500,000, thus delivering important savings to the whole academic community and removing a major barrier to the use of international data in research and teaching. In some cases this has entailed lengthy and protracted negotiations, especially since for some IGOs this is the first time that they have undertaken such data redistribution agreements. By the end of this reporting period the portfolio included:

- ILO Key Indicators of the Labour Market
- IMF Direction of Trade Statistics
- IMF International Financial Statistics
- IMF Balance of Payments Statistics
- OECD International Development Statistics
- OECD International Direct Investment
- OECD International Migration Statistics
- OECD Main Science and Technology Indicators
- OECD Measuring Globalisation Statistics
- OECD Social Expenditure Statistics
- OECD Quarterly Labour Force Statistics
- UN Common Database
- UNIDO Industrial Statistics Databases
- UNIDO Demand Supply Databases
- World Bank World Development Indicators
- World Bank Global Development Finance

In total the ESDS International portfolio covers a diverse range of topics such as human development, globalisation, migration, labour markets, social expenditure, demography, environment, education, science and technology. For example, the United Nations Industrial Development Organization (UNIDO) Industrial Statistics, presented in three annual databases covering up to 175 countries worldwide from 1963 onwards, contain data on employment, wages, output, value added, gross fixed capital formation, number of female employees, number of establishments and production level broken down by industrial sector; while the International Monetary Fund (IMF) International Financial Statistics include monthly figures since 1948 and reports, for most countries, time series data on exchange rates, balance of payments, international liquidity, money and banking, interest rates, prices, production, international transactions, government accounts, national accounts and population.



In addition to the data collections already mentioned, at the beginning of this reporting year ESDS International took over responsibility (from the UKDA) of the Time Series Data, formerly known as National Statistics (NS) DataBank and produced by ONS. This is a collection of 40 major data publications containing over 40,000 time series relating to economics, trade, employment and industry. The datasets include Labour Market Statistics, Monthly Digest, Consumer Trends, The Pink Book and The Blue Book.

Lastly, a significant achievement this year has been the agreement of a data redistribution licence with Eurostat and the UK Datashop. This followed a very protracted and difficult negotiation, yet an agreement for free academic access to Eurostat New Cronos data was eventually signed by all concerned parties in July 2004.

### CommonGIS application

November 2003 saw the release of ESDS International's CommonGIS web-based data exploration and visualisation interface to a set of key international statistics.

This was initially piloted with the Central Intelligence Agency (CIA) World Factbook 2002 socio-economic data, which has since been enhanced and updated to include 2004 data. As part of this development the CommonGIS interface has also been supplied to GEsorce - the geography and environment hub of the Resource Discovery Network. The application is being hosted on GEsorce World Guide pages which, on average had just over a quarter of a million hits per month in its first three months. It is hoped this will provide very good exposure of the service and may attract a new user base.

### Development of training courses and data guides

Over the course of the year a number of introductory and advanced user guides have been produced to coincide with the release of the datasets, including worksheets and worked examples. These include a comprehensive dataset description and subject overview, links to appropriate supporting information, details of spatial and temporal coverage as well as information on periodicity and frequency of update. Equally a generic international data guide has been posted on the ESDS web site.

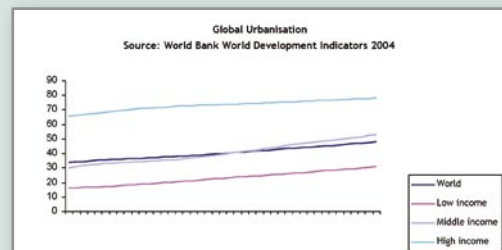
In addition to user guides, in order to facilitate resource discovery, comprehensive metadata catalogue records are created for each new dataset edition for both the MIMAS metadatabase ([www.mimas.ac.uk/metadata/](http://www.mimas.ac.uk/metadata/)) and the UK Data Archive catalogue.

Lastly, a number of specific courses have also been developed and offered over the year. These include an introductory course on time series analysis (April) and a number of introductory and data analysis courses.

### EXAMPLE OF USE: International Databanks

The World Development Indicators contain data on urban population levels for the last forty years and the UN Common Database contains projections of urban growth up to the year 2050. These data are used to investigate the phenomenon of global urbanisation.

By 2007, more than half the people in the world will be living in cities - according to the United Nations *World Urbanization Prospects*. As the chart shows, this is the result of a continuing movement of people that has led to a tremendous growth in urban areas around the world.



Forty-eight per cent of the world's population or three billion people lived in urban areas in 2003. The global urban population is projected to reach 50 per cent by the year 2007 and 60 per cent by 2030, growing at an average annual rate of 1.8 per cent (nearly double the rate expected for the population as a whole). At this rate of growth, the world's urban population will double in 38 years.

The process of urbanisation is most advanced in the higher income countries, where almost 80 per cent of the population already live in metropolitan areas. This figure drops to 50 per cent for middle income countries. In low income countries the majority of people still live in the countryside. These regions are showing the fastest rate of urban growth and it is projected almost all the world's total population growth between 2000 and 2030 will take place in the cities of these countries.

#### Sources

United Nations Department of Economic and Social Affairs Population Division, (2004) *World Urbanization Prospects: The 2003 Revision*, New York: United Nations. ISBN 92-1-141396-0.

Data from World Bank, World Development Indicators 2004 release, ESDS International.

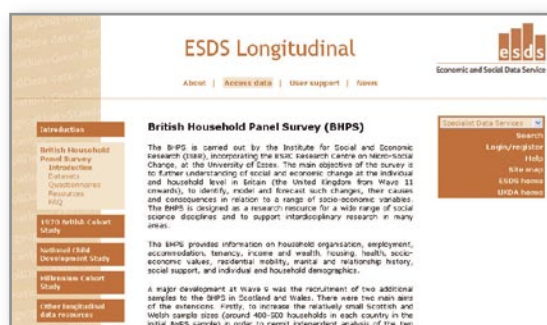
# Longitudinal

## ESDS Longitudinal

supporting the use of key UK longitudinal data collections

### BHPS Nesstar samplers

An important element of the data enhancement work of ESDS Longitudinal has been to create sampler files derived from the British Household Panel Survey (BHPS) which are then mounted in the Nesstar online data browsing and exploration software. The BHPS, due to the richness of the information it provides, is the most frequently used longitudinal data collection held by ESDS. However, with over 10,000 variables across 11 waves, its complexity may appear daunting to first-time and inexperienced users. Thus the samplers are designed to provide potential users of this large and complex dataset with a taste of how the BHPS might be used. As with other Nesstar datasets, the sampler is in an accessible rectangular format and is therefore ideal both for exploratory research and as a tool for teaching on research methods courses.



Over this year, two BHPS samplers have been generated and released online. The first contains wave one respondents, and follows them for eleven waves, selecting broadly the same variables at each wave. Substantively, the dataset is in the area of work, family and health, but it can also be used to examine social mobility and income mobility. The dataset contains a number of background variables indicating parental social class, and some opinion variables relating to the work and family theme. The second sampler dataset, released in May 2004, is based around the theme of social and political attitudes. Like the first it contains wave one respondents, which are followed for eleven waves, selecting broadly the same variables at each wave.

The twelfth wave of the full BHPS dataset was released in June, and further samplers are planned.

### National Strategy for Longitudinal Studies

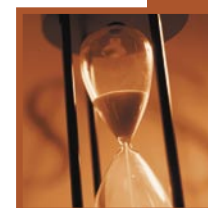
ESDS Longitudinal staff played an important part in meetings of the National Strategy Committee for Longitudinal Studies, which brings together key players in longitudinal studies to advise the UK Longitudinal Studies Centre and the ESRC on a strategy for co-ordinating the social science effort in longitudinal studies and ensuring that the needs of social scientists are met. Issues high on the agenda for the National Longitudinal Strategy Committee were discussed at a meeting in April. One key issue is how best to provide geographical detail on longitudinal files without breaching confidentiality. These include releasing geographical information under a strict contract with the user and adding an area-level classification that does not reveal the location but simply describes its characteristics.

A framework for quality profiles has been agreed. Quality profiles are designed to define the key elements of quality relevant to longitudinal studies and provide information to inform each element. Profiles have been produced for the BHPS and are currently being produced for the Millennium Cohort Study (MCS). By documenting, in an accessible way, the main aspects of data quality (e.g. relevance, accuracy, timeliness, accessibility), users are helped to make informed decisions about their analysis, and also identify areas where remedial work is needed.

The Committee is also concerned with new areas where data are not available but where there is a research need. One such area is qualitative longitudinal studies and ESRC have commissioned a consultancy on the feasibility of a qualitative longitudinal study. Another area is longitudinal data to support analyses of ethnic differences. An initial scoping study was conducted by David Owen and Anne Green and this is now being developed further by Office for National Statistics (ONS) and ESRC.

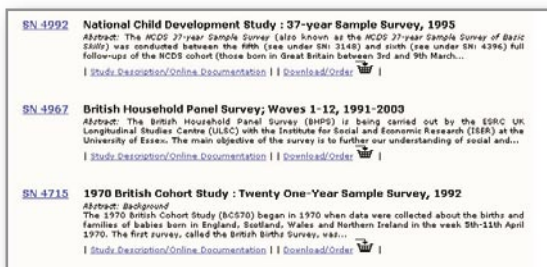
### Awareness raising and training

In order to both increase usage of longitudinal datasets and to aid methodological understanding in analysing longitudinal data an important element of ESDS Longitudinal's remit is to organise and provide data awareness and training events. Over the course of the year a number of such events have been held. These have included in-depth data confrontation workshops on both the National Child Development Survey (NCDS) and British Cohort Study (BCS70) held at the Institute of Education (October 2003);



and a specialist one-day seminar which introduced some of the key longitudinal data series available in the UK held as part as part of the ESRC Social Science week (June 2004).

ESDS Longitudinal also contributed to the ESRC Research Methods Festival held in Oxford (July 2004), participating in a two hour drop-in session and providing an introduction for participants to sources of longitudinal data and how to access them.



In addition to sessions aimed at raising awareness of longitudinal data and analysis methods, ESDS Longitudinal has been involved in a number of study data specific events. These are typically organised by ESDS in conjunction with the data creators, and are aimed at researchers and policy makers interested in using data from the study.

Issues covered usually include: background to the study and the innovations it offers; sample design; fieldwork, research instruments and content of the surveys; accessing the data via the ESDS; data documentation; and an example of a piece of data analysis undertaken on the data. These events included sessions on the Millennium Cohort Study (MCS) in November, and the NCDS and BCS70 in March. In addition to hosting a programme of workshops on the major longitudinal data series, ESDS Longitudinal also promotes other events and training resources for researchers interested in longitudinal data and analysis.

### New data resources

In addition to the twelfth wave of the BHPS, ESDS Longitudinal also acquired new editions of the MCS and the National Child Development Study : 37-year Sample Survey. It has also been involved in ongoing discussion with the National Centre for Social Research (NatCen) regarding the forthcoming acquisition of the English Longitudinal Study of Ageing (ELSA).

## EXAMPLES OF USE: Recent research using ESDS Longitudinal data

### What Savings Behaviour Reveals about People's Views of the National Health Service

People who are not covered by private medical insurance do not appear to save more in anticipation of unexpected private health care expenses or income losses while waiting for public treatment, according to research by Alessandra Guariglia (University of Nottingham) and Mariacristina Rossi (University of Rome at Tor Vergata), using BHPS data, and it seems to suggest that the National Health Service (NHS) is still considered to be a reliable institution despite the numerous criticisms.

The research also finds that people without private medical insurance appear to save more only in rural areas and in those areas where the quality of medical facilities is felt to be poor. These are places characterised by fewer or worse NHS providers.

### Key Influences on Young People Staying in School after the Age of 16

Whether young people will stay in school after the age of 16 can very often be predicted by their intentions at the age of 11. Parents' educational qualifications also have a strong impact on the probability of young people continuing their education. This is despite the fact that nearly all young people, whatever their parents' educational background, say that it matters to them to do well at school.

These are the central findings of research by Paul Croll and Diana Moses (University of Reading) using longitudinal data from 762 young people interviewed from age 11 onwards in the BHPS.

### English Employees have Greater Job Mobility than their Scottish Counterparts

English employees are not only more mobile between jobs than their counterparts in Scotland, but would be even more mobile were they to be employed north of the border. In contrast, Scottish employees would do worse – in terms of mobility – in the English labour market. These are among the conclusions of new research by Axel Heitmueller (Heriot-Watt University).

The study contrasts the impacts of personal characteristics and labour market structure on job mobility rates, using data from the BHPS and its Scottish extension sample.

Full press releases are at:  
[www.iser.essex.ac.uk/press/archive/2003.php](http://www.iser.essex.ac.uk/press/archive/2003.php)



# Qualidata

## ESDS Qualidata

providing enhanced access and support for a range of multimedia qualitative data sources

### Data enhancements

Enhancing qualitative data in order that they can be used more easily and effectively by researchers and teachers is central to the ESDS Qualidata mission. In the context of archiving qualitative data, enhancement has two meanings.

The first consists of digitising by converting paper to some electronic form. Many of the older and most valuable qualitative collections exist only in paper format and require this type of enhancement to become web-enabled. Digitising work is carried out to three different levels: searchable Portable Document Format (PDF), digitised for download, and eXtended Mark-up Language (XML)-tagged for online access.

The second form of enhancement of content involves augmenting a data collection with additional contextual materials to make the collection more useful to potential researchers. This content enhancement focuses on materials that reveal both the context and the process of the original research, and depends on the nature of the collection, the complexity of the methodology and the materials available.

This year saw the complete enhanced collection released by ESDS Qualidata - the acclaimed study by Professor Mildred Blaxter, on *Mothers and Daughters: Accounts of Health in the Grandmother Generation, 1945-1978*. The research looks at beliefs and attitudes to health and medical care, inter-generational relationships, and social history of members of a grandmother generation. In this case, enhancements covered: conversion from paper to searchable Microsoft Word and Rich Text Format (RTF) by Optical Character Recognition (OCR); extensive editing and formatting of forty-six interview transcripts; production of a brief Scots dialect glossary; and compiling a user guide consisting of background study and research information. The collection is available for instant web download and is also made available through the ESDS Qualidata Online system.

### Online access to qualitative data

This year has seen the expansion of the Edwardians Online, piloted by ESDS Qualidata in 2003, to form the generic ESDS Qualidata Online system. The first area of development has been the re-design of the web site to be consistent with the new ESDS Qualidata layout and navigation. More significantly, the data collections have been increased beyond *The Edwardians: Family Life and Work Experience Before 1918* interviews to include data from additional collections.

Depending on the dataset, various combinations of interview transcripts, interview summaries, methodology and background materials will be available to browse and search. For example, researchers can now select and search interviews from multiple datasets, including *Mothers and Daughters*, and Paul Thompson's more recent study of *100 Families: Families, Social Mobility and Ageing, an Intergenerational Approach*.



ESDS Qualidata Online is centred on a vision for access to qualitative data utilising non-proprietary XML-based formats and systems for preserving, searching, and disseminating qualitative data. Currently, behind-the-scenes work required to load or publish textual data (primarily from interview transcripts) into the ESDS Qualidata Online system is extensive. ESDS Qualidata has been liaising with teams at Sheffield, Oxford and Edinburgh on automating this process, for example making use of natural language processing tools and XML mark-up strategies.

Currently, ESDS Qualidata is using a very limited set of XML elements with mark-up consisting of distinguishing turns of speech, and identifying basic demographic characteristics of an interviewee (pseudonym, gender, year of birth, residence, occupation etc.). A first draft of a specific Document Type Definition (DTD) for describing and marking up the content of qualitative data, building upon the Data Documentation Initiative (DDI) and Text Encoding Initiative (TEI) to enable more complex mark-up, such as codes, researcher annotations, geo-spatial references, was presented at the International Association for Social Science Information Services and Technology (IASSIST) conference, held at the University of Wisconsin, Madison in May 2004. The DTD is still under development.

[www.esds.ac.uk/qualidata](http://www.esds.ac.uk/qualidata)



## Publicity and outreach

Given that, to some extent, the culture of secondary analysis of qualitative data materials is still emerging, an important remit for ESDS Qualidata is to raise the level of awareness of the availability of, and potential for, utilising qualitative data sources in research, learning and teaching. Thus promotional efforts to draw researchers and teachers attention to the possibilities of re-using ESDS Qualidata sources are of great importance.



To this end, ESDS Qualidata staff continue to publish on various aspects of archiving, accessing and re-using qualitative data. For example, this year saw the publication of a special issue of the *International Journal of Social Research Methodology, Theory and Practice* which contains an edited collection of papers given at the 2001 conference organised by ESDS Qualidata on Celebrating Classic Sociology: Pioneers of Contemporary British Qualitative Research. Other publications include L. Corti and P. Thompson (2003) 'Secondary Analysis of Archive Data' in C. Searle et al (eds.), *Qualitative Research Practice*, London: Sage Publications.

ESDS Qualidata staff were also busy on the road this year. In January, ESDS Qualidata held a workshop in London - Online Access to Qualitative Data: Opportunities and Challenges. The well-attended conference focused on issues surrounding the provision of online access and technical strategies for publishing and exchanging qualitative data. Staff contributed to the ongoing ESDS series of best practice in data creation and documentation workshops, aimed at ESRC researchers. Other workshops held this year were on secondary analysis of data using the Computer Assisted Qualitative Data Analysis Software (CAQDAS) package Atlas-ti.

Finally, in March 2004 a two-day conference, jointly sponsored by ESDS Qualidata and the Institute of Community Studies, entitled 'Whither Community Studies?' was held at the Institute of Community Studies, London. The first part of the workshop brought together scholars who worked in the field in its heyday up until the 1970s, giving accounts of their research experience which explored both the possibilities and the difficulties of community studies, while the second part looked towards the future.

## Usage

Lastly, while usage statistics for the ESDS services are reported in a separate statistical section, it is worth noting that this year has witnessed an important increase in the use of qualitative data, with a total of 56 data requests being recorded over the year, compared with an average of around 20 in previous years. This reverses the trend of previous years where most substantial usage was through access to the paper classic sociology collections that ESDS Qualidata had archived in the past. As hoped, core usage is now through the central UKDA/ESDS catalogue showing that the hard work put into processing this material is paying off. One final interesting fact, is a breaking of the cycle where most researchers were making use of only one or two key collections and overlooking recently-released material. More and more orders are being placed for the recent data.

### CASE STUDY



Mike Savage is Professor of Sociology at the University of Manchester, where his current interests are in the broad area of social stratification. As part of his current Leverhulme Fellowship he has been undertaking fieldwork involving the re-study of the qualitative and archival data used in selected 'classic' works of post-war English sociology for his project on *Popular Social Identities in England, 1950-2000*. Over the past year, Mike has made numerous visits to the National Social Policy and Social Change Archive at the University of Essex to use a selection of the ESDS Qualidata 'classic sociology' collections, including Elizabeth Bott's *Family and Social Network* and John Goldthorpe and David Lockwood's *The Affluent Worker*. He has been re-reading and coding up the data to the coding frame he developed for his current research, providing evidence for his book. Mike is also interested in the methodological aspects of re-visiting older studies, and is intending to publish his findings in key journals.

# Diary of the year 2003-2004

## August 03

**ESDS** host a seminar for data librarians, University of Westminster, London

**Acquisitions team** attend joint ESDS/Office for National Statistics (ONS) meeting on web sites for government surveys, London

**Ekkehard Mochmann**, Director of the Zentralarchiv, University of Cologne and **Gail Richie**, Bank of Canada visit the UKDA

## September 03

**ESDS Government** hold seminar on *Using Government Surveys and International Datasets for Research*, University of Surrey

**ESDS Government** run event on *Social science data resources: new opportunity for using government surveys and census micro data*, University of Newcastle

**ESDS** host an open day as part of the national *Archives Awareness Week*, University of Essex

**Paul Rodda**, University of Natal, visits ESDS Qualidata

**ESDS Access and Preservation staff** attend the *MultiTees Thesauri and Taxonomies* conference, London

## October 03

**ESDS Qualidata** hold a one-day hands-on workshop on *Social Science Data Archives: creating, depositing and using data*, University of Glamorgan

**The Director** speaks at *Privacy in the Information Age: A Symposium in Honor of the 40th Anniversary of ICPSR*, University of Michigan, USA

**ESDS Government** host a Labour Force Survey User Group meeting, London

**ESDS Government** host a one-day meeting on the *European Social Survey*, London

**ESDS Longitudinal** in conjunction with the Centre for Longitudinal Studies hold one of the regular events on, *NCDS and BCS70: a workshop for potential users*, Institute of Education, London

## November 03

**Henian Zhand, Xiaowen Lu** from the Shanghai Academy of Social Science, **Susanna Keranen**, Finnish Data Archive, and **Jana Borovickova** and colleagues, Czech Republic visit the UKDA

**ESDS Longitudinal** in conjunction with the Centre for Longitudinal Studies run a one-day workshop on the *Millennium Cohort Study (MCS): a meeting for potential users*, Institute of Education, London

**ESDS Qualidata** host a one-day workshop on *Social Science Data Archives for Social Historians: creating, depositing and using qualitative data*, Institute of Historical Research, London

**ESDS** run a hands-on workshop on *Social Science Data Archives: Creating, depositing and using data*, University of Edinburgh

## December 03

**ESDS Government** host their first User Conference on *Social and demographic change in Britain - informing the future*, London

**ESDS Director** attends a meeting of the European Strategy Forum for Research Infrastructure (ESFRI) ad hoc working group on Research Infrastructure in the Social Sciences and Humanities (RISSH), Copenhagen

**ESDS** host an *Awareness Day for New Users*, Royal Statistical Society, London

**Kevin Schürer** and **Angela Dale** attend the *CODATA/ERPANET Archiving Workshop: The selection, approval and retention of social science data in the UK - with reflections on the European experience*, Lisbon

## January 04

**ESDS Qualidata** host a one-day conference on *Online access to qualitative data: Opportunities and Challenges*, London

**Lulama Makhubela**, National Development Agency, South Africa visits ESDS Qualidata

**ESDS Government** host the first meeting of the *Health Survey User Group*, London

## February 04

**Louise Corti** speaks at a one-day workshop for government researchers, Northern Ireland Statistics and Research Agency (NISRA), Belfast

**ESDS Access and Preservation** run an *Awareness Day for New Users*, Queens University, Belfast

## March 04

First meeting of the **ESDS Advisory Committee**, London

**ESDS Acquisitions** team meet with Dr Kate Chamberlain, Welsh Assembly, Cardiff

**ESDS Government** host a seminar on *Weighting the Social Surveys*, London

**ESDS Qualidata staff** attend a two-day workshop on *Whither Community Studies?*, co-sponsored by ESDS Qualidata, and the Institute of Community Studies, London

**Louise Corti** presents paper on *Archiving research data* at Royal College of Nursing Annual Conference, University of Cambridge

**ESDS Longitudinal** run *Workshop: introduction to using the BHPS*, University of Edinburgh

**ESDS Longitudinal** in conjunction with the Centre for Longitudinal Studies run *NCDS and BCS70: a workshop for potential users*, Institute of Education, London

**Mary Vardigan**, Inter-University Consortium for Political and Social Research (ICPSR) visits ESDS staff at the UKDA

## April 04

**ESDS Access and Preservation** hold hands-on workshops on *Social Science Data Archives: creating, depositing and using data*, in Edinburgh and Oxford

**ESDS International** run a workshop on *Introduction to the ESDS International Databanks*, Manchester

**ESDS International** run a workshop on *Introduction to the Analysis of Time Series using STATA*, Manchester

**ESDS Access and Preservation** hold a hands-on workshop on *Social Science Data Archives: creating, depositing and using data*, University of Oxford

## May 04

**ESDS Government** host seminar on *Linking Data: understanding the past and looking into the future*, Manchester

**ESDS staff** present session and hands-on workshop at Social Science Information Gateway (SOSIG) roadshow, *The Internet for Psychologists*, London

## June 04

**Sharleen Forbes**, Statistics New Zealand, **Amy Pienta**, Inter-University Consortium for Political and Social Research (ICPSR), and **Iris Alfredsson**, Swedish Social Science Data Services (SSD), visit ESDS staff at UKDA

**ESDS Access and Preservation** hold a one-day hands-on workshop on *Social Science Data Archives: creating, depositing and using data*, University of Cambridge

**ESDS Longitudinal** hosts a one-day seminar on *Introducing the UK cohort and panel studies*, London

**ESDS Government** run workshops on *Using government surveys for research, and Analysing hierarchical survey data*, Manchester

**ESDS Qualidata** run a one-day hands-on workshop on *Secondary analysis of qualitative data: using Atlas-ti to explore archived sources*, Essex

## July 04

**ESDS staff** run sessions and present papers at the ESRC Research Methods Festival, Oxford

**ESDS International** host a workshop on *Introduction to the ESDS International Databanks*, London

# Statistics

This section produces a statistical summary of activity across all the services of ESDS. Figures are also produced in certain cases for the five-year period from 1998-99 in order that change over time can be gauged. However, a note of caution is offered to those wishing to compare figures relating to the current reporting year with those of earlier years.

Given that funders have changed the reporting period of the UKDA/ESDS three times in as many years, the task of producing comparative information is not straightforward. The current reporting year covers the period 1 August 2003 to 31 July 2004. For previous periods from 1998 to 2001 the reporting year ran from 1 October to 30 September. In 2001-02 the reporting period was actually for 15 months (1 October 2001 to 31 December 2002). However, in order to aid comparison, the totals for this period have been adjusted to give a 12 month average. The seven-month period 1 January to 31 July 2003 is not covered in the figures presented. An interim report of ESDS for this seven-month period, however, has been produced and is available upon request.

Lastly, it should be noted that for those thirsting for more detailed statistical information on the working of ESDS the service provides quarterly statistical returns in the form of a service level definition to the JISC Monitoring Unit (MU). These are all available from [www.esds.ac.uk/news/jiscmu.asp](http://www.esds.ac.uk/news/jiscmu.asp).

## Data acquired and processed

All data for ESDS, with the exception of international macro data series, are acquired, processed and mounted on the Download service for online access by ESDS Access and Preservation at the UKDA. Due to the special licensing arrangements relating to international macro data series, these are acquired directly by ESDS International, processed and loaded onto the Beyond 20/20 Web Data Server (WDS).

**Table 1 Datasets acquired and processed for online delivery**

Service	New datasets	Updates and new editions	Total
Core	52	9	61
Government	34	104	138
International	15	42	57
Longitudinal	1	2	3
Qualidata	11	1	12
Total	113	158	271

Over the reporting year a total of 271 new datasets, updates and new editions were acquired, processed and made available online via either Download or Beyond 20/20 WDS. Table 1 shows that of these 271 datasets, just over half (50.9 per cent) were classed as Government and just under a quarter (22.5 per cent) as Core – being those datasets that do not fall under the remit of any of the four specialist data services of ESDS. In addition to the 271 datasets shown in Table 1, ESDS Access and Preservation acquired a total of 538 datasets from sister archives overseas and supplied these to users without formal acquisition, processing and cataloguing.

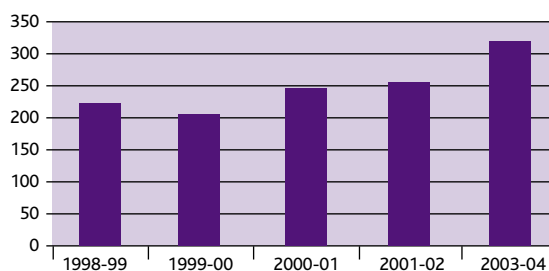
ESDS Access and Preservation also undertakes enhanced processing of data for publication in the Nesstar system for online browsing and data exploration, as well as the basic processing of data reported in Table 1. Table 2 shows that this year 54 datasets were published in Nesstar, of which the greatest proportion are government datasets.

**Table 2 Datasets processed for delivery via Nesstar**

Service	New datasets	Updates and new editions	Total
Core	3	1	4
Government	26	18	44
International	1	1	2
Longitudinal	4	0	4
Total	34	20	54

Comparison with previous years is provided in Figure 1. Taking the basic processing and value-added Nesstar processing together, this illustrates that the volume of throughput, in terms of the number of datasets acquired and processed has increased by over a fifth (28.9 per cent) since 2001-02 and by over a third (41.9 per cent) since 1998-99.

**Figure 1 Datasets processed, 1998 to 2004**



Given that resources for basic data processing have been reduced in real terms over this period, the efficiency gains due to the development of improved internal tools and procedures has been significant.

## Datasets delivered

Usage of ESDS is summarised by Table 3 which shows the number of data collections delivered to users by method of data access, across the various ESDS services. Before commenting on the information contained within Table 3, two notes of explanation are needed.

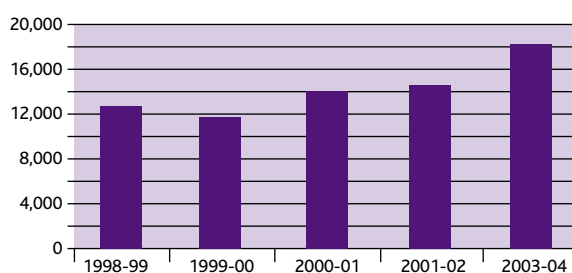
First, the table does not include information on the use of the international macro data series provided by ESDS International. Access to these data are counted in a different and incompatible way and are therefore reported separately. Thus, in effect Table 3 records all those data disseminated by ESDS Access and Preservation.

Second, due to changes with, and development of, the one-stop registration system, it was not possible to count datasets downloaded via Nesstar for the first three months of this reporting period, thus the figures in Table 3 are an underestimation of the true situation.

Table 3 shows that in terms of method of data access, Download is clearly the most popular method with users, accounting for some 72 per cent of the total volume of data collections delivered. For clarity, it should be noted that the heading 'Via/access' relates to data that are accessed by users via third parties, such as the local data libraries at Edinburgh, Oxford and the London School of Economics and Political Science (LSE). Government data are the most requested type of data, accounting for 62 per cent of total usage.

It is not possible to break down categories of data delivered prior to the establishment of ESDS, but Figure 2 compares the total number of datasets delivered over the past five years. This shows that the 17,776 datasets accessed by users in the current period represents a 55 per cent increase in use compared to 2001-02 and virtually a trebling (185 per cent increase) in the volume of datasets disseminated since 1998-99.

Figure 2 Datasets delivered, 1998 to 2004



As noted already, the international macro data series disseminated by MIMAS for ESDS International are counted in a different way to those recorded in Table 3. Usage for these data is measured not by the number of datasets delivered but instead by sessions. Over the reporting year, the number of sessions for the international macro data series held on Beyond 20/20 WDS and National Statistics (NS) Time Series respectively, were 15,082 and 2,136, with a total of 1,732 and 661 active users. These figures illustrate the significant demand for the newly-available international macro data, with demand spread over a large number of higher and further education institutions.

Table 3 Datasets delivered to users by access method

Service	Download	FTP	Via/access	Portable media	Nesstar	Total
Core	2,537	527	178	179	593	4,014
Government	8,680	132	1,762	160	350	11,084
International*	7	558	143	119	4	831
Longitudinal	1,529	23	133	25	84	1,794
Qualidata**	22	0	13	21		56
Total	12,775	1,240	2,229	504	1,031	17,779

\* international micro datasets only, macro data series counted separately (see Table 4) \*\* Nesstar does not include qualitative data

Table 4 ESDS International datasets accessed via Beyond 20/20 and SearchNS

ESDS International macro datasets	Total number of sessions (i.e. every access)	Total number of active users	Total number of institutions	Delivery method
OECD, IMF, World Bank, UNIDO, UNCDB datasets	15,082	1,732	122	Beyond 20/20
National Statistics Time Series Data	2,136	661	Information not available	SearchNS

Lastly, in considering use, it is possible for users to view data by interactively constructing tables online from the Nesstar data browsing tools. This is in addition to downloading datasets. It has only proved possible to record the number of such analyses undertaken in Nesstar since the new ESDS registration system was introduced in June. However, if one extrapolates from the available data then a conservative estimate would place the number of data analyses carried out within Nesstar, separate from actually downloading the associated data, at approximately 10,500 over the year.

## User queries

User queries are normally fielded initially by ESDS Management and, if necessary, referred for answering to one of the specialist ESDS services. Table 5 shows that the bulk of user queries were of a non-specific kind (e.g. How can I register? How do I get these data? Do you have data on?) and were fielded and answered by ESDS Management without referral to one of the four specialist services.

**Table 5 User queries received by ESDS by service responsible for answering**

Service	Queries	Referrals	Total
Core	1,231	0	1,231
Government	262	74	336
International	270	10	280
Longitudinal	86	0	86
Qualidata	162	0	162
Total	2,011	84	2,095

Beyond these, the level of user queries tend roughly to be in line with the volume of data use, but with one notable exception: ESDS Qualidata queries account for some eight per cent of the total, pro rata a much higher level than usage of qualitative datasets would predict.

This suggests that in the case of those undertaking qualitative research, ESDS performs an important supporting role in addition to supplying data, namely providing advice about qualitative methods, confidentiality and legal disclosure and related ethical issues.

## Web site usage

It is important to recognise that in addition to the datasets delivered to users, a huge amount of additional information about data, using data and creating datasets is available from the combined UKDA/ESDS web sites. For example, Portable Document Format (PDF) versions of user guides and associated

reports and documentation for all the data collections held by ESDS are freely available for download from the web site, and do not require prior registration.

Thus, in assessing the service provided by ESDS it is important to take into account the level of activity on the UKDA/ESDS web sites. Over the reporting year a total of 13,189,876 hits were made across the web sites, averaging at 36,037 hits per day. A total of 588,193 separate visitors were recorded over the year, at an average of 1,607 visitors per day, each making an average of 22.4 hits each.

**Table 6 Web site hits by country of origin**

Country	Hits	Visitors
United Kingdom	4,222,847	111,099
United States	411,325	10,795
Australia	136,985	6,625
Canada	115,412	5,200
Germany	92,566	4,805
Netherlands	76,041	4,019
Finland	62,180	2,167
France	61,890	2,381
Italy	60,482	2,313
Japan	53,167	4,063

With this level of usage, ESDS clearly reaches beyond the higher and further education social science community and beyond the UK. Forty countries recorded a total of 5,000 web hits or over. Usage, ranked by total number of hits, for the top ten countries (where country of origin is known) is provided in Table 6.

## Registrations

Table 7 shows that over the course of the reporting year ESDS registered 5,649 new users. This is a major achievement for the new service, since in previous periods the number of users in a given year would normally have been between two and three thousand. Much of this growth can be attributed to the new macro data series available through ESDS International, but this clearly does not account for the whole picture, with usage up in all areas of ESDS activity. At the end of the reporting year, there were a total of just under 14,000 users with active registrations.

**Table 7 Number of registrations and active users**

New registrations	5,649
Total active users	13,991

## Usage by user type

The six sections of Figure 3 demonstrate that the core active user groups are academic staff and postgraduate students at institutions of higher education, together representing 80-90 per cent of service usage. Public sector workers (central and local government, charitable organisations, non-governmental organisations (NGOs), etc.) account for eight to ten per cent of service usage, with the exception of ESDS International

macro data, for whom licensing arrangements prohibit their access. ESDS International macro data have a strikingly different balance of user types, with a dramatically larger proportion of undergraduates using the service. This may reflect an increased usage of data in the classroom and may also be a reflection of applicability of these data to undergraduate teaching and learning.

Figure 3a Active users by user type for ESDS Core

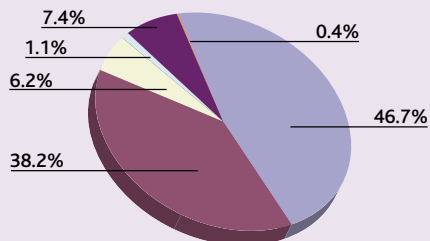


Figure 3d Active users by user type for ESDS International macro data

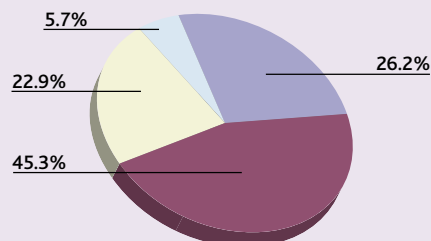


Figure 3b Active users by user type for ESDS Government

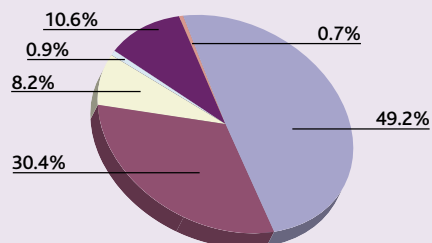


Figure 3e Active users by user type for ESDS Longitudinal

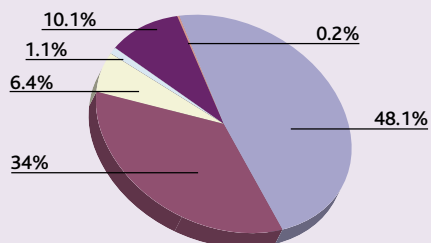


Figure 3c Active users by user type for ESDS International micro data

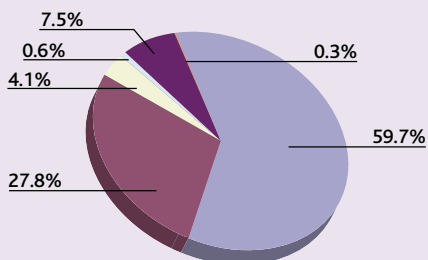
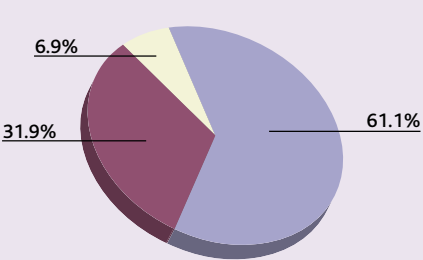


Figure 3f Active users by user type for ESDS Qualidata



Legend for Figure 3 charts

■ academic ■ postgraduate ■ undergraduate ■ other student ■ public sector ■ commercial



## Usage by discipline

The six sections of Figure 4 show the relative proportions of active users in the most popular disciplinary areas for each of the specialist services. The disciplinary coverage is similar among the Core, Government, Longitudinal, and International services. With some variations, the largest disciplinary users are economics and sociology, which has long been the traditional base for these secondary data services. ESDS International macro data service shows wide usage by

business/accounting/finance, which is not surprising given its portfolio. Interestingly, it also attracts significant usage from the natural sciences, mathematics, and engineering, unlike any other service. ESDS Qualidata shows a different pattern than the quantitative services, with no users in economics and a significant proportion of usage by support services, reflecting that users need local support and encouragement to use these data.

Figure 4a Active users by discipline for ESDS Core

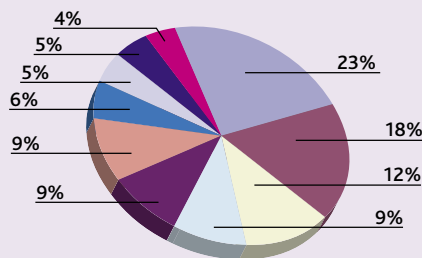


Figure 4d Active users by discipline for ESDS International macro data

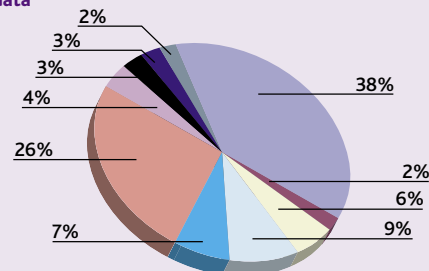


Figure 4b Active users by discipline for ESDS Government

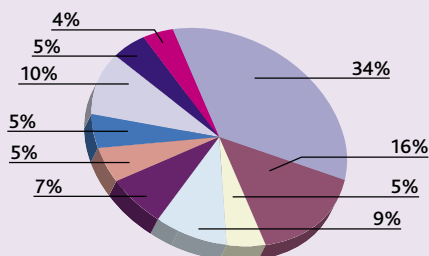


Figure 4e Active users by discipline for ESDS Longitudinal

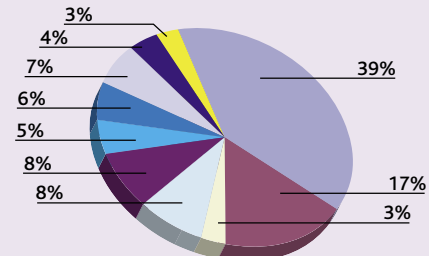


Figure 4c Active users by discipline for ESDS International micro data

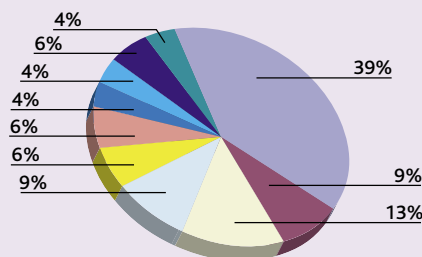
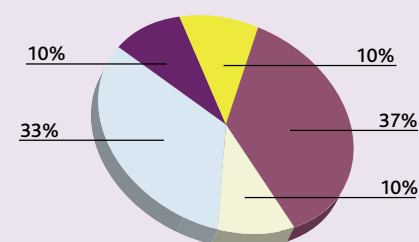


Figure 4f Active users by discipline for ESDS Qualidata



### Legend for Figure 4 charts

Economics/Econometrics	Sociology	Politics/International Studies	Support services
Social Policy/Administration	Economics/Labour/Employment	Business/Accounting/Finance	Statistics/Methodology/Computing
Natural Science/Engineering/Maths	History	Health/Medicine	Geography
Environment/Housing/Planning	Area Studies	Psychology	Communication, Cultural/Media Studies

## Feedback

"Your databases are wonderful and very useful for me as a student. It seems to me that there is no other country that holds such enormous, valuable information for research purposes."

"The new web site and data access system is extremely efficient and easy to use. Thank you very much for all your hard work."

"Amazing! It works. Great tips. Many thanks indeed for your time and efficient help."

"Thanks for the recent e-mails regarding the problems we've encountered in using the CasWeb. I am very grateful for all the help you have given to us (including adding me to the circulation list). Thanks once again."

"That is absolutely fantastic! Thank you so much for your efforts and help. If a lowly researcher can ever return the favour then please get in contact. This query was dealt with great efficiency, and you deserve a wonderful weekend."

"Thanks again for all your help. I have been very impressed with the service."

"Thank you very much for sending me the file so quickly! It is exactly what we need for our training sessions."

"Thank you so much for all your help! The case is closed, got the data successfully."

"Thank so much for your hard work on getting me all these links. They are very helpful and I believe that I got them all."

"I must tell you, having contacted many national statistics bureaus and data archives, yours is by far the most efficient and user friendly."

"Thank you very much for both providing the data and the speed of your response. You have been terrific and it is very much appreciated."

"Thank you very much for your guidance. We were able to access the necessary data in time. Your assistance was very much appreciated."

"Wow, thank you for all of this - what an excellent service. I will be certainly checking out the sources below. Once again, thank you for your efficient and speedy response!"

"Many thanks for the impressively fast and very useful reply."

"I just wanted to say how useful the material [SN 1670 - Coping Responses to Marital Violence] was - all my classes reported that this was an extremely interesting session going through some of the research data. Many students were even visibly moved by it in class, and it brought home (to me as well as them!) the fact that the kinds of principles we discuss on the course really do have effects on the research results and on participants' lives. I definitely plan to do the same again next year. So a big thank you to the data-archive and the library, everyone was extremely helpful and efficient."

"Thanks, it was enriching workshop. Looking forward to attend two months course where I enjoy my stay and study."

"the arrangement between MIMAS [ESDS International] and the IMF has been successful in terms of your role in facilitating access to our data" - IMF representative

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