

FJ (JAN) NIEUWENHUIS

MARTINI QUALITATIVE RESEARCH: SHAKEN, NOT STIRRED

Abstract

Although the number of qualitative research studies has boomed in recent years, close observation reveals that often the research designs and methodological considerations and approaches have developed a type of configuration that does not adhere to purist definitions of the labels attached. Very often so called interpretivist studies are not interpretivist, and data analyses do not fit the methodological considerations that underpin the study. This paper look at some of the typical pitfalls that particularly novice researchers get themselves entrapped in when they carelessly ‘blend’ or ‘stir’ qualitative research methodologies and methods. The notion of ‘blended’ qualitative research is conceptually shaken in terms of its paradigmatic roots, methodological approaches and data analysis considerations. Based on this, I will postulate that many of the “Martini” qualitative research studies should rather be classified as descriptive or exploratory qualitative research studies and that the label of emergent coding in data analyse should best be replaced with a priori coding as data analysis approach.

Introduction

It started gradually, and then over the last three or four years as external examiner and supervisor of postgraduate students I have notice an increase in an emerging trend: The growth of something that I will loosely call *blended qualitative research* or *Martini research*. I am not going to argue whether the *blended qualitative research* exists or does not exist, but I would rather pay attention to the emergence of looseness in *qualitative research* that seriously undermines the rigour and character of qualitative studies. My expostulation in this paper is therefore against those researchers that arbitrarily blend things that by their very nature should not be blended. Time will not allow me to discuss all the permutations of how various qualitative traditions are blended, but I would like to start a discussion by briefly looking at three aspects: (a) the conceptualisation or labelling of the research (i.e. the ontological nature of the research), (b) the methodological (theoretical/paradigmatic nature of the research), and (c) the analysis of data.

The conceptualization of qualitative studies

Over the last century a wide range of approaches to qualitative research has developed that are based on different theoretical understandings and methodologies, such as phenomenology, hermeneutics, interpretivism, symbolic interactionism, anthropology, sociolinguistics, ethnomethodology, qualitative evaluation, neo-Marxist ethnography, feminism, etc. (Atkinson, 2005). Hesse-Biber and Leavy (2011) argue that qualitative research is an exciting interdisciplinary landscape comprising diverse perspectives and practices for generating knowledge. The fact that it is widely used across the disciplines results in a number of terms that are often used interchangeably, such as ‘ethnography’, ‘case study’, ‘qualitative research’, ‘interpretivism’ though each term has its own particular meaning. The

result is that qualitative research methods today are a diverse set of ideas encompassing approaches such as empirical phenomenology, grounded theory, ethnography, protocol analysis and discourse analysis (Miles & Gilbert, 2007). I would argue that as researchers we have a tendency to blend different approaches/methodologies although they are not meant to be blended. For the sake of my argument I will look at one such example.

It seems to me that novice researchers often assume that all qualitative studies are located within an 'interpretivist ontology'. Often, these novice researchers spend time explaining multiple realities, multiple identities, constructivism, and how researchers can only make sense of the world by looking at how people through interaction with others construct reality. However, by the time novice researchers get to the methodology and the methods of data collection and data analysis they have long forgotten their claimed ontological stance. At the root of the problem is a tendency to allow methods to dictate methodology (Newby, 1997; Creswell & Watson, 2008). While it should be a serious and thorough process of finding an own ontological and methodological stance consonant with your values and concerns (Salmon, 1992, p. 77), many novice researchers brush over their ontological understanding to get to method. The result is an impoverished understanding of ontology and researcher's ontological stance.

In many cases, it seems that novice researchers have not grasped the philosophical underpinnings of the nature of science. They use terms arbitrarily and simply massage them into fitting with what seems to be in fashion. Often their whole approach to ontology is nothing more than a flirtation with words and an eclectic compilation of plagiarised ideas that are loosely woven together with no substantive theoretical underpinning. They seem to be oblivious to the fact that ontology in essence also entails the commitment of language befitting a specific conceptualization. Most of the terms and concepts used in research refer to complex sets of human behaviour and understandings and can seldom be reduced to simple, fixed and unambiguous definitions (Gough, 2004). A prime example is the unsound practice to assume that philosophical grounding is something you can easily mix and match. This is particularly true in the case of mixed method research where a researcher tries to sit on two theoretical chairs: positivism and interpretivism. It creates all types of contradictions and tensions as the poor researcher tries to juggle two theoretical traditions rather than finding an alternative philosophical home, such as pragmatism (Rorty, 1982).

Griffiths (1998, p. 48) warns that it "... is important for researchers coming new to the field to be aware that any brief explanation is bound to be partial. The exact meanings of terms ... are inherently unstable, precisely because of the depth of argument about them". Brushing over ontology without penetrating the deeper lying concerns, assumptions and values associated with a particular position is to try and give credence to something that inherently does not have it. Often, it ends in a parade of terms deprived of meaning or a senseless attack on positivism, and a desperate attempt to justify qualitative research. Qualitative research has reached a maturity that does not need this type of superfluous turf wars. In fact, we are long past the duality of quantitative/qualitative debate and the researcher should grapple with the more substantive philosophical debates of ontology.

Methodology¹

Methodology is the bridge that brings our philosophical standpoint (i.e. our ontology) and method (the tools and instruments to be used in gathering data) together (Hesse-Biber & Leave, 2011). However, in reviewing research projects it seems that methodology is often determined by method. For example, the researcher who is familiar with interviewing as a method tries to justify the choice of methodology as if it is dependent on method. Yet, method should not be allowed to dictate methodology.

It seems to me that when it comes to qualitative methodologies, novice researchers often reduce qualitative research methodology to a singular *interpretivist* approach. They often create the idea that what makes qualitative research distinctly different is that it deals with the interpretation of texts or words. The problem may be related to the claim made by authors such as Polkinghorne (1983) when they claim that all qualitative studies rely on linguistic rather than numerical data, and employ *meaning-based* rather than statistical forms of data analysis. The notion of meaning-based is then equated by novice researchers as implying interpretivism. This is of course a misrepresentation. All researchers, irrespective of methodology employed will at some point need to interpret collected data to come to particular finding based on the data set. A *t-value* in quantitative research only has meaning once it is interpreted, but that does not make it an interpretivist study.

True interpretivist research takes on a different meaning. As Crotty (1998, p. 67) puts it: “Interpretivism, looks for culturally derived and historically situated interpretations of the social life-world”. Carson et al. (2001) argue that interpretivism departs from an assumption that reality is relative and multiple. According to this tradition there can be more than one reality and more than a single structured way of accessing such realities. The knowledge generated from an interpretivist approach is based on socially constructed and subjective interpretations (Carson et al., 2001; Hudson & Ozanne, 1988) thus creating a complexity of different interpretivist approaches, such as symbolic interactionism, phenomenology, realism, hermeneutics, naturalistic inquiry, etc. as well as hybrids and permutations such as hermeneutic phenomenology and symbolic hermeneutics. It is therefore erroneous to claim that all qualitative research is interpretivist in nature.

Closer scrutiny of many studies often reveal very little that bears resemblance to anything vaguely related to interpretivism. Sandelowski (2000, 2010) claims that researchers often use these more prestigious concepts, such as interpretivism, narrative or phenomenology, when their study is in fact *qualitative description*. This does not mean that such research is of a lesser status or less scientific. On the contrary, researchers “... conducting qualitative descriptive studies stay close to their data and to the surface of words and events” (Sandelowski, 2000, p. 334), but their work produces worthwhile information that can inform other studies. What their work does not do is to go deeper to a level where their interpretations are culturally derived and historically situated interpretations of the social life-world

¹ Methods are the tools that researchers use to collect data. These tools enable us to gather data from individuals, groups, artefacts and texts in any medium about social reality. Methodology entail some understanding of the world and how to know it, variously referred to as theory, philosophy, or paradigm and therefore include all aspects of the research design pertaining to sampling, data collection, data analysis, and trustworthiness.

(Crotty, 1998) and thus they cannot really claim their work is interpretivist in nature. What typically makes a study a “qualitative description” study is the low-inference when data is analysed and presented. It does not interrogate the deeper lying discourse, or deconstruct the hidden meanings and it does not consider different ways in which the data could have been presented. It takes for granted that which was offered and present it in a way that seldom penetrates deeper than the surface. It does not imply a total absence of interpretation, but what is presented is “... filtered through human perceptions” (Wolcott, 1994, p. 13), and it does not evolve into ‘thick descriptions’, or a theory rich analysis or a complex interrogation of meaning or discourse. What it does, is to offer a well-substantiated description of a phenomenon in its contextual setting thereby assisting us to form a better understanding of a phenomenon in its contextual setting. One of the key requirements for good descriptive research remains data saturation and if that has not been achieved then the rigour of the study is disputable.

Qualitative exploratory designs are typified by the aim to gain better insight into a specific situation. It is not designed to come up with final answers or solutions to problems. According to Stebbins (2001, p. 327) such research is a distinctive way of conducting science so as to reveal an emergent reality, identity and meanings related to concepts, cultural artefacts, structural arrangements, social processes, and beliefs and belief systems normally found in a group, process, activity, or situation under study. The rationale for doing qualitative exploratory research is not so much located in a particular ontological position as it is in the conviction that, as knowledge project, researchers possess little or no scientific knowledge about the group, process, activity, or situation they want to examine. Qualitative exploratory is primarily inductive and aimed at collecting sufficient data about a particular phenomenon using a smallish sample, purposively selected, to gain insight and understanding of the particular phenomenon in its contextual setting. Good qualitative exploratory studies could lead to the formulation of a hypothesis that requires further investigation or it could inform the further development and refinement of theory. Many studies often paraded as interpretivist fall into the cadre of qualitative exploratory studies.

Data analysis: ‘shaken, not stirred’

Elliott & Timulak (2005) maintain that qualitative research often employs a general strategy that provides the backbone for the analysis – a step-by-step recipe for analysing qualitative research data starting with the preparation of data, to the coding and categorising of data. Although important and useful it does not fit every single type of qualitative study. All qualitative studies in the final analysis end in some form of content analysis. The type of content analysis to be used is determined by the methodology employed. If the methodology or methods were inappropriate the data analysis is doomed to fail. And this is where the arbitrary blending of methods and methodology avenges itself.

Content analysis is defined as a systematic, replicable technique for compressing many words of text into fewer content categories based on explicit rules of coding (Stemler, 2001). In general three types of content analysis are distinguished. First, the conventional content analysis (also called *emergent coding*), with its coding of data into categories derived directly from the textual data

(inductively). This, unfortunately, is the type of content analysis that is generally abused as most novice researchers try to massage their data analysis to fit the emergent coding regime. This could be totally erroneous if the study was incorrectly located in its methodological home. If the methodology was more appropriately located as descriptive or exploratory, the methods of collection would have been commensurate with the type of study and the analysis will logically follow and be more directed. Since most studies spend a considerable time in literature review and the development of a theoretical framework, the methods of data collection and the questions asked are, as a rule, pre-defined by the theory or literature reviewed (Weber, 1990). The researcher therefore has *a priori list* of questions taken from theory to be asked that are already grouped in terms of categories, making the whole exercise so graphically described in the emergent coding approach, superfluous.

In general, novice researchers take great care in discussing the limitations of their study. They explain how the data are specific to the context and participants studied. They take great pain in stressing that the study cannot be generalised, that the sample was limited, that the area of study was confined to a particular school district, etc., but for some reason they feel compelled to make recommendations and then all these claims evaporate into thin air and with the greatest of confidence they make recommendations that should apply to all schools, to all educators and to contexts. Qualitative research is not intended to culminate in recommendations aimed at improving practice. It is not in the nature of qualitative research to do it. The purpose of qualitative research as Dougherty (2002) puts it, is to unravel the complex and intricate webs of contexts and people so we can appreciate what the phenomenon is really like in practice, how it works, and how it is affected by other patterns in the organization or society. Qualitative research is based on the principle that social life is inherently complex, and is inextricably bound up in ongoing social action among people in the situation. Qualitative research therefore aims at adding to our knowledge project and posing hypotheses worth further exploration, it corroborates theory, refines theory or develop new theories requiring further research.

Conclusion

In the literature there is general agreement amongst scholars regarding the range and diversity of approaches, methodologies and methods in qualitative research. As Peshkin (1993), Reid & Gough (2000) claim no singular paradigm or research model should have a monopoly in education research. Drawing on a diversity of approaches, techniques and traditions is essential to the vibrancy, openness and continuance of education research (Reid & Gough, 2000). Researchers, both experienced and those new to the field, should embrace the opportunities created by these developments, but you cannot shake and stir your Martini and you cannot blend methods and methodologies that do not blend.

References

- Atkinson, P. (2005): Unity and Diversity. *Qualitative Research*, 6(3), Art. 26. <http://www.qualitative-research.net/index.php/fqs/article/view/4/9>. Accessed June 2014.

- Bertaux, D. (1981): From the life-history approach to the transformation of sociological practice. In Bertaux, D. (Ed.) *Biography and society: The life history approach in the social sciences*. London: Sage, 29-45.
- Carson, D., Gilmore, A., Perry, C. & Gronhaug, K. (2001): *Qualitative Marketing Research*. London: Sage.
- Creswell, J. (2008): *Educational Research: Planning, Conducting, and Evaluating Quantitative and Qualitative Research*. Upper Saddle River, NJ: Pearson Education.
- Crotty, M. (1998): *Foundations of Social Research*. London: Sage.
- Dougherty, D. (2002): Grounded Theory Research Methods. In J. A. C. Baum (Ed.) *Companion to Organizations*. London: Blackwell Publishers, 849-867.
- Elliott, R. & Timulak, L. (2005): Descriptive and interpretive approaches to qualitative research. In J. Miles & P. Gilbert (Eds.) *A Handbook of Research Methods in Clinical and Health Psychology*. Oxford, UK: Oxford University Press, 147-159.
- Gough, N. (2004): Environmental education research: Producing 'truth' or reducing ignorance? Paper presented at Effective Sustainability Education: What Works? Why? Where Next? Linking Research and Practice 18-20 February, Sydney.
- Griffiths, M. (1998): *Educational Research for Social Justice: Getting off the Fence*. Buckingham: Open University Press.
- Hesse-Biber, S. N. & Leavy, P. (2011): *The Practice of Qualitative Research*. Boston: Sage.
- Hudson, L. A. & Ozanne, J. L. (1988): Alternative ways of seeking knowledge. *Consumer Research*, 14, 508-521.
- Miles, J. & Gilbert, P. (Eds.) (2007): *A handbook of research methods for clinical and health psychology*. London: Oxford Press.
- Newby, H. (1997): One World, Two cultures: Sociology and the Environment. In Owen, L. & Unwin, T. (Eds.) *Environmental Management: Readings and Case Studies*. Oxford: Blackwell.
- Peshkin, A. (1993): Goodness of Qualitative Research. *Educational Researcher*, 22, 23-29.
- Polkinghorne, D. (1983): *Methodology for the human sciences*. Albany, NY: Human Sciences Press.
- Reid, A. & Gough, S. (2000): Guidelines for Reporting and Evaluating Qualitative Research: what are the alternatives? *Environmental Education Research*, 6(1), 59-92.
- Rorty, R. (1982): *Consequences of Pragmatism*. Minneapolis: University of Minnesota Press.
- Salmon, W. (1994): Causality without Counterfactuals. *Philosophy of Science*, 61(2), 297-312.
- Sandelowski, M. (2000): Whatever happened to qualitative description? *Research in Nursing & Health*, 23, 334-340.
- Sandelowski, M. (2010): What's in a Name? Qualitative Description Revisited. *Research in Nursing & Health*, 33, 77-84.
- Stebbins, R. A. (2001): *Exploratory research in the social sciences*. Thousand Oaks, CA: Sage.
- Stemler, S. (2001): An overview of content analysis. *Practical Assessment, Research and Evaluation*, 7(17), 137-146.
- Weber, R. P. (1990): *Basic content analysis* (2nd Edition). Newbury Park, CA: Sage.
- Wolcott, H. F. (1994): *Transforming qualitative data: Description, analysis, and interpretation*. Thousand Oaks, CA: Sage.

Prof. Dr. FJ (Jan) Nieuwenhuis
 University of Pretoria
 South Africa
 jan.nieuwenhuis@up.ac.za