

Using Qualitative Methods to Study Commonalities

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Chapter 4

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Introduction

In some respects, qualitative research does not seem as scientific as other kinds of social research. Usually when we think of social science we think of sweeping statements like: “people with more education tend to get better jobs” or “poor countries tend to have more social conflict and political instability than rich countries.” These statements offer “big-picture” views that say nothing about individual cases. In these big-picture views, a single statistic or percentage can summarize a vast amount of information about countless cases.

But a lot may be missed in the big picture. Often, researchers do not want these broad views of social phenomena because they believe that a proper understanding can be achieved only through *in-depth* examination of specific cases. Indeed, qualitative researchers often initiate research with a conviction that big-picture representations seriously misrepresent or fail to represent important social phenomena.

Sometimes the emphasis of the qualitative approach on in-depth knowledge means the researcher examines only a single case (for example, the life history of a single individual or the history of a single organization.) knowing as much as possible about one case is not easy because every case potentially offers information that is infinite in its detail. In the qualitative approach, researchers must determine which information is useful in the course of the investigation. In the course of learning more about the research subject, the investigator sharpens his or her understanding of the case by refining and elaborating “images” of the research subject and relating these to analytic frames. These emerging images serve to structure further inquiry by marking some data collection paths as promising and others as dead ends.

Qualitative research often involves a process of reciprocal clarification of the researcher’s image of the research , on the one hand, and the concepts that frame the investigation, on the other. Images are built up from cases, sometimes by looking for similarities among several examples of the phenomenon that seem to be in the same general category. These images, in turn, can be related to concepts.

A concept is a general idea that may apply to many specific instances. Concepts offer abstract summaries of the properties shared by the members of a category of social phenomena. They are the key components of analytic frames, which, in turn are derived from ideas – current theoretical thinking about social life.

The Goals of Qualitative Research

Because of its emphasis on in-depth knowledge and on the refinement and elaboration and concepts, qualitative research is especially appropriate for several of the central goals of social research. These include: giving voice, interpreting historical or cultural significance, and advancing theory.

Giving Voice

There are many groups in society, called marginalized groups, who are outside of society’s mainstream. (poor, sexual minority, racial and ethnic minorities etc) these groups lack voice in society.

Techniques that help uncover subtle aspects and features of these groups can go a long way toward helping researchers construct better representations of their experiences. By emphasizing close, in-depth empirical study, the qualitative approach is well suited for the difficult task of representing groups that escape the grasp of other approaches.

Interpreting Historically or culturally Significant Phenomena

How we think about an important event or historic episode affects how we understand ourselves as a society or as a nation. Methods that help us see things in new ways facilitate this goal of interpreting and reinterpreting significant historical events. The important point is that the qualitative approach mandates close attention to historical detail in the effort to construct new understandings of culturally significant phenomena.

Advancing Theory

There are many ways to advance theory. New information about a broad pattern that holds across many cases can stimulate new theoretical thinking. When much is known about the case, it is easier to see how the different parts or aspects of case fit together. It is impossible to decide which bits of evidence about a case are relevant without clarifying the concepts and ideas that frame the investigation. The initial goal of knowing as much as possible about a case eventually gives way to an attempt to identify the features of the case that seem most significant to the researcher and his or her questions. Researcher cannot forever remain open to all information that their cases offer. If they do, they are quickly overwhelmed by a mass of indecipherable and sometimes contradictory evidence.

Finally, qualitative research also advances theory in its emphasis on the commonalities that exist across cases. Identifying commonalities across diverse cases requires that the investigator look at the cases in a different way and perhaps discover new things about them. By looking for similarities in unexpected places, social researchers develop new insights that advance theoretical thinking.

The Process of Qualitative Research

Qualitative research is often less structured than other kind of social research. Qualitative researchers rarely test theories. They usually seek to use one or more cases or categories of cases to develop ideas. The qualitative researcher starts out by selecting relevant research sites and cases, then identifies “sensitizing concepts”, clarifies major concepts and empirical categories in the course of the investigation, and may end the project by elaborating one or more analytic frames.

Selecting Sites and Cases

Qualitative research is strongly shaped by the choice of research subjects and sites. When the goal of the research is to give voice, a specific group is chosen for study. When the goal is to assess historical or cultural significance, a specific set of events or other slice of social life is selected. When the goal is to advance theory, a case may be chosen because it is unusual in some way and thus presents a special opportunity for the elaboration of new ideas.

Sometimes cases are chosen not because they are special or unusual or significant in some way, but because they are typical or undistinguished.

In-depth knowledge is sometimes achieved through the study of a single case. Often, however, it is best achieved by studying several instances of the same thing because different aspects may be more visible in different cases. When qualitative researchers collect data on many instances of the phenomenon under study, they focus on what the different instances have in common. Examining multiple instances of the same thing makes it possible to deepen and enrich a representation.

When many instances of the same thing are studied, researchers may keep adding instances until the investigation reaches a point of saturation. The researcher stops learning new things about the case and recently collected evidence. It is impossible to tell beforehand how many instances the researcher will have to examine before the point of saturation is reached.

Even when qualitative researchers study many instances of the same thing (when 50 priests are interviewed for example) they often describe the case as singular. (“The case of Christian Priests”) because the focus is on commonalities – features that the instances share. The important point is that

even though many examples of the same thing may be examined, research that emphasizes similarities seeks to construct a single, composite portrait of the case.

Use of Sensitizing Concepts

It is impossible to initiate a qualitative study without some sense of why the subject is worth studying and what concepts might be used to guide the investigation. These concepts are often drawn from half-formed, tentative analytic frames, which typically reflect current theoretical ideas. These initial, sensitizing concepts get the research started, but they do not straitjacket the research. The researcher expects that these initial concepts at a minimum will be altered significantly or even discarded in the course of the research.

Sometimes concepts that seem important or useful early in the study prove to be dead ends, and they are discarded and replaced by new concepts drawn from different frames. Armed with new concepts, the researcher may decide that some of the evidence that earlier seemed irrelevant needs to be reexamined.

Clarifying Concepts and Categories

Qualitative research clarifies concepts (the key components of analytic frames) and empirical categories (which group similar instances of social phenomena) in a reciprocal manner. These two activities categorizing and conceptualizing go hand in hand because concepts define categories and the members of a category exemplify or illustrate the concepts that unite them into a category.

Researchers develop concepts from the images that emerge from the categories of phenomena they examine. They then test the limits of the concepts they develop by closely examining the members of relevant categories.

When encountering contradictory evidence, researchers have two choices. They can discard the concept they were developing and try to develop new ones – concepts that do a better job of uniting the members of the category. Or they can narrow the category of phenomena relevant to their concept and try to achieve a better fit with the concept.

Elaborating Analytic frames

Because categories and concepts are clarified in the course of qualitative research, the researcher may not be certain what the research subject is a ‘case of’ until all the evidence is collected and studied. Deciding that the research subject is a case of something and then representing it that way is often the very last phase of qualitative research.

In some research strategies the main purpose of the analytic frame is to express the theory to be tested in terms of the relevant cases and variables. In qualitative research there is often only a tentative, vaguely formulated analytic frame at the outset because it is developed in the course of the research.

Not all qualitative researchers develop analytic frames. Many of them are content to report detailed treatments of the cases they study and leave their analytic frames implicit and unstated. They think that their cases speak well enough for themselves.

Using Qualitative Methods

There are many different ways to achieve in-depth knowledge. In sociology, anthropology and most other social sciences, qualitative methods are often identified with participant observation, in-depth interviewing, fieldwork, and ethnographic study. These techniques are best for studying social situations at the level of person-to-person interaction.

The key features common to all qualitative methods can be seen when they are contrasted with quantitative methods. Most quantitative data techniques are data condensers. They condense data in order to reveal the big picture. Qualitative methods, by contrast, are best understood as data

condensers. When data are enhanced, it is possible to see key aspects of cases more clearly, depending on how it is done.

When qualitative methods are used to enhance social data, researchers see things about their subjects that they might miss otherwise; data enhancement is the key to in-depth knowledge. While there are many such procedures that are common to most qualitative work are: analytic induction and theoretical sampling. Both techniques are

Analytic Induction

Analytic induction means very different things to different researchers. Originally, it had a very strict meaning and was identified with the search for “universals” in social life. Universals are properties that are invariant. Today, however, analytic induction is often used to refer to any systematic examination of similarities that seeks to develop concepts or ideas.

The method of analytic induction is used both to construct images and to seek out contrary evidence because it sees such evidence as the best raw material for improving initial images. As a data procedure, this technique is less concerned with how much positive evidence has been accumulated.

Analytic induction facilitates the reciprocal clarification of concepts and categories, a key feature of qualitative research. The technique involves looking for relevant similarities among the instances of a category, and then linking these to refine an image. If relevant similarities cannot be identified, then either the category is too wide and heterogeneous and should be narrowed. Or else the researcher needs to take another look at the evidence and reconceptualize possible similarities. Negative cases are especially important because they are either excluded when the relevant category is narrowed, or they are the main focus when the investigator attempts to reconceptualize commonalities thereby reconcile contradictory evidence. The goal is not fit, per se, but a conceptual refinement that provides a deeper understanding to the research subject.

Theoretical Sampling

Sometimes qualitative researchers conduct investigations of related phenomena in several different settings, theoretical sampling (a term coined by Barney Glaser and Anselm Strauss) is a process of choosing new research sites or cases to compare with one that has already been studied.

When a researcher employs a strategy of theoretical sampling, the selection of additional cases is often determined by questions and issues raised in the first case studies. The researcher's sampling strategy evolves as his or her understanding of the research subject and the concepts it exemplifies. The selection of the new sites follows directly from ideas developed in the first site and provides an opportunity to confirm and deepen the insights developed in that settings.

The example of Th. S. also shows that it is a technique of data triangulation. – way of using independent pieces of information to get a better fix on something that is partially known or understood.

Theoretical sampling is also a powerful technique for building analytic frames.

Study of a Single case

The techniques of analytic induction and theoretical sampling work best when there are multiple instances of the phenomenon the researcher is studying. Single case study is structured in ways that parallel analytic induction.

Analytic frames play an important part in the process because they define some facts as relevant and others as irrelevant, and different frames define different sets of facts as relevant.

In the study of a single case, the problem is to see if all the facts that are relevant in some way to the suggested frame agree with or support an interpretation.

Conclusion

Qualitative methods are holistic, meaning that aspects of cases are viewed in the context of the whole case, and researchers often must triangulate information about a number of cases in order to make sense of one case. Qualitative methods are used to uncover essential features of a case and then illuminate key relationships among these features.