PART ONE

Introduction to Qualitative Research

CHAPTER 1

The Nature of Qualitative Research: Development and Perspectives

This chapter is an attempt to trace the background of qualitative research, its development and its main features. It also focuses on some epistemological and methodological issues. The aim is to put the more pragmatic and practical sections in the book into a theoretical and methodological context.

Qualitative research is a form of social inquiry that focuses on the way people interpret and make sense of their experiences and the world in which they live. In the words of Atkinson *et al.* (2001: 7) it is an 'umbrella term', and a number of different approaches exist within the wider framework of this type of research. Most of these have the same aim: to understand the social reality of individuals, groups and cultures. Researchers use qualitative approaches to explore the behaviour, perspectives, feelings and experiences of people and what lies at the core of their lives. Specifically, ethnographers focus on culture and customs, grounded theorists investigate social processes and interaction, while phenomenologists consider the meanings of experience and describe the life world. Qualitative methodology is also useful in the exploration of change or conflict. The basis of qualitative research lies in the interpretive approach to social reality and in the description of the lived experience of human beings.

Qualitative and quantitative approaches: underlying philosophies

Social reality can be approached in different ways, and researchers will have to select between varieties of research approaches. While often making a choice on practical grounds, they must also understand the philosophical ideas on which it is based.

The initial choice is not easy. Approaches to social inquiry consist not only of the procedures of sampling, data collection and analysis, but they are based on particular ideas about the world and the nature of knowledge which sometimes reflect conflicting and competing views about social reality. Some of these positions towards the social world are concerned with the very nature of reality and existence (*ontology*). From this, basic assumptions about knowledge arise. *Epistemology* is the theory of knowledge and is concerned with the question of

what counts as valid knowledge. *Methodology* refers to the principles and ideas on which researchers base their procedures and strategies (*methods*). To assist in understanding the background to the interpretive/descriptive approach, the following section provides a discussion of epistemological and methodological ideas.

Several sets of assumptions underlie social research; they are often referred to as the *positivist* and the *interpretivist* paradigms (Bryman, 2001). Conflict and tension between different schools of social science have existed for a long time. In the positivist approach, the focus was on the methods of natural science that became a model for early social sciences such as psychology and later sociology. Interpretivists stressed that human beings differ from the material world and the distinction between humans and matter should be mirrored in the methods of investigation. Qualitative research was critical of the natural science model. Many researchers hold a 'separatist' position and believe the worldviews of qualitative and quantitative researchers to be completely incompatible. They reject a mix of the two (Murphy and Dingwall, 2001).

Social scientists continue to raise the paradigm debate in spite of the warning by Atkinson (1995) that simplistic polarisation between positivist and qualitative inquiry will not do. He criticises the use of the concept of the term *paradigm* and the 'paradigm *mentality*'. Nurse researchers, too, accuse nursing of unwarranted 'paradigmatic thinking' and maintain that it restricts rather than extends knowledge (Thorne *et al.*, 1999). Nevertheless, qualitative researchers are defensive of their methodologies and tend to develop arguments against other approaches. Indeed, they often follow the same path of which they accuse quantitative researchers (Darbyshire, 1997), namely to be critical of other approaches and uncritical of their own perspective.

It is important to describe and trace the development of ideas so that novice researchers are able to identify the roots of the different approaches.

The natural science model: positivism, objectivism or naturalism

From the nineteenth century onwards, the traditional and favoured approaches to social and behavioural research were quantitative. Quantitative research has its base in the positivist and early natural science paradigm that has influenced social science throughout the nineteenth and the first half of the twentieth century.

Positivism is an approach to science based on a belief in universal laws and insistence on objectivity and neutrality (Thompson, 1995). Positivists follow the natural science approach by testing theories and hypotheses. The methods of natural – in particular physical – science stem from the seventeenth, eighteenth and nineteenth centuries. Comte (1798–1857), the French philosopher who created the terms 'positivism' and 'sociology', suggested that the emerging social sciences must proceed in the same way as natural science by adopting natural science research methods.

One of the traits of this type of research is the quest for objectivity and distance between researcher and those studied so that biases can be avoided. Investigators searched for patterns and regularities and believed that universal laws and rules or law-like generalities exist for human action. They thought that findings would and should be generalisable to all similar situations and settings. Behaviour could be predicted, so they believed, on the basis of these laws. Even today many researchers think that numerical measurement, statistical analysis and the search for cause and effect lie at the heart of all research. They feel that detachment and objectivity are possible, and that numerical measurement results in objective knowledge. In this positivist approach, researchers control the theoretical framework, sampling frames and the structure of the research. This type of research seeks causal relationships and focuses on prediction and control.

Popper (1959) claimed falsifiability as the main criterion of science. The researcher formulates a hypothesis – an expected outcome – and tests it. Scientists refute or falsify hypotheses. When a deviant case is found the hypothesis is falsified. Knowledge is always provisional because new incoming data may refute it. There has been criticism of Popper's ideas (for instance by Feyerabend (1993)) but the debate cannot be developed here. It is discussed in philosophy of science texts.

The positivist approach develops from a theoretical perspective, and a hypothesis is often, though not always, established before the research begins. The model of science adopted is hypothetico-deductive; it moves from the general to the specific, and its main aim is to test theory. The danger of this approach is that researchers treat perceptions of the social world as objective or absolute and neglect everyday subjective interpretations and the context of the research.

Nineteenth-century positivists believed that scientific knowledge can be proven and is discovered by rigorous methods of observation and experiments and derived through the senses. Chalmers (1999) argues against a simplistic view of science as knowledge deriving from sense perception only. Even natural scientists – for instance biologists and physicists – do not necessarily agree on what science is and adopt a variety of different scientific approaches. Social scientists too, use a number of approaches and differ in their understandings about the nature of science. Scientific knowledge is difficult to prove and is not merely derived from the senses. The search for objectivity may be futile for scientists. They can strive for it, but their own biases and experiences intrude. Science, whether natural or social science, cannot be 'value free', that is, it cannot be fully objective as the values and background of the researchers affect the research.

The paradigm debate

In the 1960s the traditional view of science was criticised for its aims and methods by both natural and social scientists. The new and different evolutionary stance

taken within disciplines such as biology and psychology had gone beyond the simplistic positivist approach. Qualitative researchers go further still. Lincoln and Guba (1990), for instance, argue that a 'paradigm shift' occurred – in line with the ideas of Kuhn (1962, 1970).

Kuhn's thinking has had great impact on the paradigm debate. 'Normal science', with its community of scholars, he asserts, proceeds through a series of crises that hinder its development. Earlier methods of science are questioned and new ways adopted; certain theoretical and philosophical presuppositions are replaced by another set of assumptions taking precedence over the model from the past. Eventually, one scientific view of the world is replaced by another. Although Kuhn wrote mainly about the physical sciences, writers have used his work to draw analogies with the shift in the ideas of social science. Kuhn's (1962:162) definition of paradigm is 'entire constellation of beliefs, values, techniques, and so on, shared by the members of a given community'.

A paradigm then consists of theoretical ideas and technical procedures that a group of scientists adopt and which are rooted in a particular worldview with its own language and terminology. Kuhn has been extensively criticised (Fuller, 2000) but the critique cannot be developed here.

Social researchers today often claim that a 'paradigm shift' in social science has occurred – in the same way in which Kuhn discussed it – that a whole worldview is linked to the new paradigm. They attack the positivist stance for its emphasis on social reality as being 'out there', separate from the individual and maintain that an objective reality independent of the people under study is difficult to grasp. Quantitative research, in all its variations, is useful and valuable, but it is sometimes seen as limited by qualitative researchers, because it neglects the participants' perspectives within the context of their lives.

The controlled conditions of traditional approaches sometimes limit practical applications. This type of research does not always or easily answer complex questions about the nature of the human condition. Researchers using these approaches are not inherently concerned about human interaction or feelings, thoughts and perceptions of people in their research but with facts, measurable behaviour and cause and effect.

Quantitative approaches are important and solve many types of research problem. Qualitative research is appropriate for different types of questions.

It must not be forgotten that natural scientists, too, have criticised the sometimes mechanistic natural science view of the world, and some sociologists began to see it as socially constructed and defined. However, one could argue, that there has not been a 'scientific revolution' with a new paradigm. Many, such as Atkinson (1995) and Thorne *et al.* (1999) challenge the notion of paradigm shift and believe that the debate is a simplification of complex issues.

The interpretive/descriptive approach

The interpretive or interpretivist model and descriptive research have their roots in philosophy and the human sciences, particularly in history, philosophy and anthropology. The methodology centres on the way in which human beings make sense of their subjective reality and attach meaning to it. Social scientists approach people not as individual entities who exist in a vacuum but explore their world within the whole of their life context. Researchers with this worldview believe that understanding human experiences is as important as focusing on explanation, prediction and control. The interpretive/descriptive model has a long history, from its roots in the nineteenth century to Dilthey's philosophy, Weberian sociology and George Herbert Mead's social psychology.

The interpretivist view can be linked to Weber's *Verstehen* approach. Philosophers and historians such as Dilthey (1833–1911) considered that the social sciences need not imitate the natural sciences; they should instead emphasise empathetic understanding. Understanding in the social sciences is inherently different from explanation in the natural sciences. Weber was well aware of the two approaches that existed in the nineteenth century (this was the time of the *Methodenstreit* – the conflict between methods). The concept of *Verstehen* – understanding something in its context – has elements of empathy, not in the psychological sense as intuitive and non-conscious feeling, but as reflective reconstruction and interpretation of the action of others. Weber believed that social scientists should be concerned with the interpretive understanding of human beings. He claimed that meaning could be found in the intentions and goals of the individual.

Weber argued that *understanding* in the social sciences is inherently different from *explanation* in the natural sciences, and he differentiates between the nomothetic, rule-governed methods of the latter and idiographic methods that are not linked to the general laws of nature but to the actions of human beings. Weber believed that numerically measured probability is quantitative only, and he wanted to stress that social science concerns itself with the qualitative. We should treat the people we study, he advised, 'as if they were human beings' and try to gain access to their experiences and perceptions by listening to them and observing them. Although Weber did not have a direct impact on early qualitative researchers (Platt, 1985), contrary to the beliefs of some social scientists, he did however influence the sociologist Schütz and ethnomethodology, as well as later writers such as Denzin and Douglas, and his ideas have helped shape the qualitative perspective through them. Sociologists developed further the interpretive perspective that initially stemmed from the writings of Mead, Weber, Schütz and others in the early twentieth century. Phenomenology as a qualitative research approach is based on philosophy in the nineteenth and early twentieth centuries, in particular the ideas of the mathematician and philosopher Husserl (1859–

1938), and Heidegger (1889–1976) who focus on ontological questions of meaning and lived experience.

Qualitative researchers claim that the experiences of people are essentially context-bound, that is, they cannot be free from time and location or the mind of the human actor. Researchers must understand the socially constructed nature of the world and realise that values and interests become part of the research process. Complete objectivity and neutrality are impossible to achieve; the values of researchers and participants can become an integral part of the research (Smith, 1983); researchers are not divorced from the phenomenon under study. This means reflexivity on their part; they must take into account their own position in the setting and situation, as the researcher is the main research tool. Language itself is context-bound and depends on the researchers' and informants' values and social location. Detailed replication or duplication of a piece of research is impossible because the research relationship, history and location of participants differ from study to study.

Qualitative methodology is not completely precise, because human beings do not always act logically or predictably. Investigators in qualitative inquiry turn to the human participants for guidance, control and direction throughout the research. Structure and order are, of course, important for the research to be scientific. The social world, however, is not orderly or systematic; therefore it is all the more important that the researcher proceeds in a well structured and systematic way.

The historical background

Qualitative research has its roots in anthropology, philosophy and sociology. It was first used by anthropologists and sociologists as a method of inquiry in the early decades of the twentieth century, although it existed in a non-structured form much earlier; researchers tried to find out about cultures and groups a long time before then – both in their own and foreign settings – and told stories of their experiences. In the 1920s and 1930s, however, social anthropologists such as Malinowski (1922) and Mead (1935), and sociologists of the Chicago School, such as Park and Burgess (1925), adopted more focused approaches. At that time qualitative research was still relatively unsystematic and journalistic (and much of it is now seen as unscientific). Researchers reported from the field – the natural settings they studied, be they foreign places or the slums and street corners of their own cities – by observing and talking to people about their lives.

Since the 1960s qualitative research has experienced a steady growth, starting with the emergence of approaches from a symbolic interactionist perspective (Becker *et al.*, 1961) and the development of grounded theory (Glaser and Strauss, 1967). Filstead (1970) edited a volume of readings on qualitative research. Publications in ethnography such as Spradley's books (1979, 1980) also gave impetus to this type of approach. Sociologists and anthropologists carried

out most of the research while academics and professionals in the education and healthcare fields adapted these approaches for their own areas. Earlier journalistic methods were abandoned because they were seen to lack rigour. In psychological phenomenology, Giorgi (1985) and Colaizzi (1978), among others, developed phenomenological research approaches rooted in the ideas of Husserl.

Much work originated in North America. The journal *Qualitative Sociology* was first published in 1978, and the *International Journal for Qualitative Studies in Education* in 1988. In 1994, Denzin and Lincoln edited the comprehensive *Handbook of Qualitative Research*, now in its second edition (2000). In Britain, qualitative research became fashionable through its use in educational sociology in the 1970s and 1980s (for instance, Delamont, 1976; Burgess, 1985; and the text by Hammersley and Atkinson (1983) of which a second edition was published in 1995). At that time health professionals in particular saw qualitative research as a type of inquiry appropriate and relevant to their work (Webb, 1984; Field and Morse, 1985; Leininger, 1985; Melia, 1987), and in the 1980s and 1990s this work grew rapidly (for instance, Morse, 1991, 1994; Smith, 1992; Benner, 1994; Morse and Field, 1996; Streubert and Carpenter, 1996, 1999). These are only a few of the many textbooks in education and nursing about qualitative research. In medicine, qualitative approaches are becoming respectable but have not yet been wholly accepted as an alternative form of research. However, a book edited by Crabtree and Miller (1992, 1999) and a series of articles in the *British Medical Journal* by sociologists compiled in a small volume (Mays and Pope, 1996, 1999) explained its use and made doctors more conscious of qualitative research, and the book edited by Greenhalgh and Hurwitz (1998) is important. Significantly, the World Health Organisation also published an overview of 'the concepts and methods used in qualitative research' (Hudelson, 1994). Murphy *et al.* (1998) published an extensive review of the literature in qualitative research in the area of health technology assessment.

The attention of British psychologists turned to qualitative research when Nicholson (1991) prepared a report for the Scientific Affairs Board of the British Psychological Society that urged a wider use of qualitative research (Richardson, 1996). In Britain, the first major general text about qualitative psychological research appeared in 1994 (Banister *et al.*, 1994). Books on specific approaches in psychological inquiry, such as discourse analysis, were published from the 1980s onwards (for instance, Potter and Wetherell, 1987; Potter, 1996). A special issue of the journal of the British Psychological Society was devoted to qualitative research (*The Psychologist*, special issue, 8, 3). Smith *et al.* (1995) and Richardson (1996) edited texts that encompassed discussions of both theoretical and practical aspects of qualitative research.

Researchers who take these approaches do not always use the term 'qualitative research'; they adopt different labels. Some call it naturalistic inquiry (Lincoln and Guba, 1985), field research (Burgess, 1984; Delamont, 1992), case study approaches (Stake, 1995; Travers, 2001) interpretive (or sometimes inter-

pretative) research (Bryman, 2001). Others seem to use the term ethnography as an overall name for much qualitative research, for instance Hammersley and Atkinson (1995). The latter highlight the lack of a 'hard and fast distinction between ethnography and other sorts of qualitative inquiry' (p. 2) and stress the diversity of qualitative approaches on the one hand and the epistemological and methodological similarities on the other. Although there are differences between qualitative approaches (Creswell, 1998), it is sometimes difficult to find clear distinctions between them even though they can be important. All qualitative research, however, focuses on the lived experience, interaction and language of human beings.

The methodology – the underlying rationale and framework of ideas and theories – determines approaches, methods and strategies to be adopted. Qualitative researchers choose a variety of approaches and procedures to achieve their aims. These include ethnography, grounded theory, phenomenology, conversation analysis, discourse analysis and cooperative inquiry among others. Some forms of social inquiry such as action research, and feminist approaches generally, though not always, use qualitative methods and techniques.

The characteristics and aims of qualitative research

Different types of qualitative research have common characteristics and use similar procedures while differences in data collection and analysis do exist.

The following elements are part of most qualitative approaches

- The data have primacy; the theoretical framework is not predetermined but derives directly from the data
- Qualitative research is context-bound, and researchers must be context sensitive
- Researchers immerse themselves in the natural setting of the people whose thoughts and feelings they wish to explore
- Qualitative researchers focus on the *emic* perspective, the views of the people involved in the research and their perceptions, meanings and interpretations
- Qualitative researchers use 'thick description': they describe, analyse and interpret
- The relationship between the researcher and the researched is close and based on a position of equality as human beings
- Data collection and data analysis generally proceed together, and in some forms of qualitative research they interact

The primacy of data

Researchers usually approach people with the aim of finding out about them; they go to the participants to collect the rich and in-depth data that may become

the basis for theorising. The interaction between the researcher and the participants leads to the generation of concepts, which are a product of the 'research act' (Denzin, 1989b). The data themselves generate new theoretical ideas, they help modify already existing theories or uncover the essence of phenomena. It means that the research design cannot be strictly predefined before the start of the research. In other types of research, assumptions and theories lead to hypotheses which are tested; sampling frames are imposed, while in qualitative research data have priority. The theoretical framework of the research project is not predetermined but based on the incoming data.

This approach to social science is, initially at least, inductive. Researchers move from the specific to the general, from the data to theory or description. They do not impose ideas or follow assumptions but give accounts of reality as seen by others. They must be open minded though they cannot help having some 'hunches' about what they may find, especially if they are familiar with the setting.

While some qualitative research is concerned with the generation of theory (Glaser and Strauss, 1967), many researchers do not achieve this; others, such as phenomenologists, do not wish to do so but focus on a phenomenon. They usually do provide description or the interpretation of participants' experiences, describing 'the characteristics and structure of the phenomenon' under study (Tesch, 1991: 22). Qualitative research is not static but developmental and dynamic in character; the focus is on *process* as well as outcomes.

Contextualisation

Researchers must be sensitive to the context of the research and immerse themselves in the setting and situation. The context of participants' lives or work affects their behaviour, and therefore researchers have to realise that the participants are grounded in their history and temporality. Researchers have to take into account the total context of people's lives. The conditions in which they gather the data, the locality, the time and history are all important. Events and actions are studied as they occur in everyday, 'real life' settings. It is important to respect the context and culture in which the study takes place. If researchers understand the context, they can locate the actions and perceptions of individuals and grasp the meanings that they communicate. In a broader sense, the context includes the economic, political and cultural framework.

Immersion in the setting

Qualitative researchers use the strategies of observing, questioning and listening, immersing themselves in the 'real' world of the participants. This may generate descriptions of a culture (Hammersley and Atkinson, 1995). It helps to focus on process, that is, on the interactions between people and the way they construct, or

change, rules and situations. Qualitative inquiry can trace progress and development over time, as perceived by the participants.

For the understanding of participants' experiences, it is necessary to become familiar with their world. When professionals do research they are often part of the setting they investigate and know it intimately. This might mean that they could miss important issues or considerations. To be able to examine the world of the participant, researchers must not take this world for granted but should question their own assumptions and act like strangers to the setting as 'naïve' observers. They 'make the familiar strange' (Delamont and Atkinson called their 1995 book *Fighting Familiarity*). Immersion might mean attending meetings with or about informants, becoming familiar with other similar situations, reading documents or observing interaction in the setting. This can even start before the formal data collection phase, but it means that researchers immerse themselves in the culture they study.

Most qualitative research investigates patterns of interaction, seeks knowledge about a group or a culture or explores the life world of individuals. In clinical, social care or educational settings this may be interaction between professionals and clients or relatives, or interaction with colleagues. It also means listening to people and attempting to see the world from their point of view. The research can be a macro- or microstudy – for instance it may take place in a hospital ward, a classroom, a residential home, a reception area or indeed the community. The culture does not just consist of the physical environment but also of particular ideologies, values and ways of thinking of its members. Researchers need sensitivity to describe or interpret what they observe and hear. Human beings are influenced by their experiences; therefore qualitative methods encompass processes and changes over time in the culture or subculture under study.

The 'emic' perspective

Qualitative approaches are linked to the subjective nature of social reality; they provide insights from the perspective of participants, enabling researchers to see things as their informants do; they explore 'the insiders' view'. Anthropologists and linguists call this the *emic perspective* (Harris, 1976). The term was initially coined by the linguist Pike in 1954. It means that researchers attempt to examine the experiences, feelings and perceptions of the people they study, rather than imposing a framework of their own that might distort the ideas of the participants. They 'uncover' the meaning people give to their experiences and the way in which they interpret them, although meanings should not be reduced to purely subjective accounts of the participants as researchers search for patterns in process and interaction, or the invariant constituents of the phenomenon they study.

Qualitative research then, is based on the premise that individuals are best placed to describe situations and feelings in their own words. Of course, these

meanings may be unclear or ambiguous, and they are not fixed; the social world is not frozen in a particular moment or situation but dynamic and changing. By observing people and listening to their accounts, researchers seek to understand the process by which participants make sense of their own behaviour and the rules that govern their actions. Taking into account their informants' intentions and motives researchers gain access to their social reality. Of course, the report individuals give are *their* explanations of an event or action, but as the researcher wishes to find people's own definition of reality, these reports are valid data. Researchers cannot always rely on the participants' accounts (Dey, 1993) but are able to take their words and actions as reflections of underlying meanings. The qualitative approach requires 'empathetic understanding', that is, the investigators must try to examine the situations, events and actions from the participants' – the social actors' – point of view and not impose their own perspective.

Of course, researchers can still theorise or infer from observed behaviour or participants' words. The researcher's view is the *etic perspective* – the outsider's view (Harris, 1976). The meanings of participants are interpreted or a phenomenon identified and described. Researchers have access to their world through experience and observation. This type of research is thought to empower participants, because they do not merely react to the questions of the researchers but have a voice and guide the study. For this reason, the people studied are generally called participants or informants rather than subjects. It is necessary that the relationship between researcher and informant is one of trust; this close relationship and the researcher's in-depth knowledge of the informant's situation make deceit unlikely (though not impossible).

Thick description

Immersion in the setting will help researchers use *thick description* (Geertz, 1973). It involves detailed portrayals of the participants' experiences, going beyond a report of surface phenomena to their interpretations, uncovering feelings and the meanings of their actions. Thick description develops from the data and the context. The task involves describing the location and the people within it, giving visual pictures of setting, events and situations as well as verbatim narratives of individuals' accounts of their perceptions and ideas in context.

The description of the situation or discussion should be thorough; this means that writers describe everything in vivid detail. Indeed Denzin (1989a: 83) defines thick description as: 'deep, dense, detailed accounts of problematic experiences . . . It presents detail, context, emotion and the webs of social relationship that join persons to one another.' Thick description is not merely factual, but includes theoretical and analytic description. Janesick (1994: 216) declared that description is the 'cornerstone of qualitative research'. Thick description is related to the term 'exhaustive description' in phenomenological research

(Colaizzi, 1978). Strauss and Corbin (1994) go further by explaining that the emphasis in one of the approaches – grounded theory – is on conceptualisation rather than description.

Thick description helps readers of a research study to develop an active role in the research because the researchers share their knowledge with the readers of the study. Through clear description of the culture, the context and the process of the research, the reader can follow the pathway of the researcher, and the two share the construction of reality coming to similar conclusions in the analysis of research (Erlandson *et al*., 1993). This shows readers of the story what they themselves would experience were they in the same situation as the participants, and therefore it should generate empathetic and experiential understanding.

Qualitative researchers are storytellers. Although the data collection and analysis are systematic and develop logically, writers present the findings and discussion in the form of a story with a distinct storyline.

The research relationship

In order to gain access to the true thoughts and feelings of the participants, researchers adopt a non-judgemental stance towards the thoughts and words of the participants. This is particularly important in interviews. The listener becomes the learner in this situation, while the informant is the teacher who is also encouraged to be reflective. Rapport does not automatically imply an intimate relationship or deep friendship (Spradley, 1979), but it does lead to negotiation and sharing of ideas. It makes the research more interesting for the participants because they feel able to ask questions. Negotiation is not a once and for all event but a continuous process.

The researcher should answer questions about the nature of the project as honestly and openly as possible without creating bias in the study. It is interesting that research books and articles differ in their advice on the relationship of researcher and informant. Some (for instance Patton, 1990) suggest a certain distance between the two, while others, such as Wilde (1992) feel that this could be a mistake because involvement and self-disclosure of the researcher facilitate disclosure and sharing of experiences from the participants. It is important for participants to realise that researchers, too, have human experiences just as they do and can empathise with them. The main goal of the meeting between researcher and informants is to gain knowledge.

Conflicting or complementary perspectives?

Some social scientists believe that qualitative and quantitative approaches are merely different methods of research to be used pragmatically, dependent on the research question (Bryman, 2001). Others decide that they are incompa-

tible and mutually exclusive on the basis of their different epistemologies (Leininger, 1992; Lincoln and Guba, 1985; Denzin and Lincoln, 2000). Researchers sometimes use one or the other, depending on their own epistemological stance. Silverman (2001) asserts that neither school is superior to the other, and that an emphasis on the polarities does not result in a useful debate, as both are valid approaches.

Many sociologists, psychologists and medical professionals work in the positivist tradition. In much health, education and social work, however, the qualitative perspective is in the ascendant. One might suggest that qualitative research is a coherent way of researching human thought, perception and behaviour (not new or uni-linear but developed to answer different questions from those of traditional approaches).

The positivist and the interpretive/descriptive perspective of social research have their roots in different assumptions about social reality. While early positivism is based on the belief that reality has existence outside and independent of individuals, those who adopt new approaches to research claim that *social* reality is constructed and does not have independence from the people creating it, although they might acknowledge that there is a reality 'out there'.

Oakley (2000) claims that qualitative researchers sometimes use the term 'positivism' as a form of abuse. She criticises this and those researchers who neglect experimental and other forms of quantitative research. She asserts that both qualitative and quantitative approaches have a place. In any case, the terms are not absolute, as numbers are often used in qualitative research, and quantitative inquiry includes measurements of quality. Also, research, whether quantitative or qualitative, can be presented in a positivist or non-positivist frame, aim or direction. Crotty (1998: 41) suggests '. . . it is a matter of positivism vs non-positivism, not a matter of qualitative vs quantitative'. Methodological debates often suffer from oversimplification.

Bryman (2001) argues that qualitative research became popular initially because of dissatisfaction with quantitative research. The latter could not, in the view of many researchers, answer the important questions in which they were interested. In qualitative nursing and midwifery research, the 'voices' of patients and clients are heard, and feelings and experiences can be grasped. There are, however, distinct differences between the major methodological approaches.

Some of the differences of qualitative and quantitative methodologies and procedures can be seen in Table 1.1.

Triangulation

Many researchers believe that qualitative and quantitative methods can be used together, and indeed, they often are. A long debate has arisen about the use of triangulation. Triangulation is the process by which several methods (data sources, theories or researchers) are used in the study of one phenomenon. The

Table 1.1 Differences between qualitative and quantitative research

	Qualitative	**Quantitative**
Aim	Exploration of participants' experiences and life world Understanding, generation of theory from data	Search for causal explanations Testing hypothesis, prediction, control
Approach	Broad focus Process oriented Context-bound, mostly natural setting Getting close to the data	Narrow focus Product oriented Context free, often in artificial or laboratory setting
Sample	Participants, informants Sampling units such as place, time and concepts Purposive and theoretical sampling Flexible sampling that develops during research	Respondents, participants (the term 'subjects' is now discouraged in the social sciences) Randomised sampling Sample frame fixed before research starts
Data collection	In-depth non-standardised interviews Participant observation/fieldwork Documents, photographs, videos	Questionnaire, standardised interviews Tightly structured observation Documents Randomised controlled trials
Analysis	Thematic, constant comparative analysis Grounded theory, ethnographic analysis etc.	Statistical analysis
Outcome	A story, an ethnography, a theory	Measurable results
Relationships	Direct involvement of researcher Research relationship close	Limited involvement of researcher Research relationship distant
Rigour	Trustworthiness, authenticity Typicality and transferability	Internal/external validity, reliability Generalisability

concept has its origin in ancient Greek mathematics; in modern times it is employed in topographic surveying as a checking system. Denzin (1989a) differentiates between four different types of triangulation: triangulation of *data*, *investigators*, *theories* and *methodologies*. The triangulation of methodologies is most often used.

In *data triangulation* researchers gain their data from different groups, locations and times. For example: in a study of hospitalisation, old and young patients' perspectives could be explored and people from different locations might be asked for their experience. The surgical and medical wards might be the locations for the research. An admission in the middle of the night might be compared with one during the day.

Investigator triangulation means that more than one researcher is involved in the research. In student projects, dissertations or theses this does not often happen, but some well-known researchers have used investigator triangulation, for instance, Strauss researched work in psychiatric hospitals with a number of other researchers (Strauss *et al*., 1964).

Theory triangulation – the use of different theoretical perspectives in the study of one problem – is rare.

Usually researchers use *methodological triangulation* in its two main forms: Within-method (intra-method) triangulation and between-method (across-method or inter-method) triangulation. Within-method triangulation adopts different strategies but stays within a single paradigm; for instance, participant observation and open-ended interviews are often used together in one qualitative study. A good example of this is Becker's study (Becker *et al*., 1961). He and his co-workers observed new doctors in the hospital setting and asked them about their work through in-depth interviews about actions, problems and incidents they found through observation.

Researchers use between-method triangulation to confirm the findings generated through one particular method by another. An example would be if a nurse constructed a questionnaire about a problem but would also employ unstructured interviews to confirm the validity of the former. It is sometimes believed that triangulation can improve validity and overcome the biases inherent in one perspective (see Chapter 16). Sarantakos (1998), however, claims that triangulation is not necessarily more valuable than single method and not suitable for every type of research. It does not automatically confer validity. Desirability of triangulation depends on the particular project and research question. We suggest that only nurses and midwives who are experienced researchers in both qualitative and quantitative methods use triangulation.

Data triangulation is different from mixing methods. In triangulation, the researchers approach the same problem in different ways or from different angles. When they mix methods, they look at different problems in the same research study using different approaches.

The debate about triangulation

Social scientists are not in accord about the use of triangulation and the mixing of methods. Hammersley (1992) denies the existence of two methodological models and claims that distinctions are dangerous. Although fundamental differences may exist in these approaches, researchers should also consider the implications of the methods for practice and operational use, where a clear distinction is not always helpful. Miles and Huberman (1994) state that one of the differences lies in the description in words in qualitative research and numbers in quantitative research, but there are, of course differences in sampling, analysis and outcomes. Qualitative and quantitative methods are often used

together in one single study for practical purposes only or to satisfy members of grant-making bodies who believe that a research study can be strengthened through using both methods.

Those with purist views suggest that the two main research methodologies have no place in one piece of research. Indeed, Leininger (1992) – who recognises that research findings from different philosophical directions can complement each other – warns researchers against mixing the two methodologies because they differ in philosophy, traits and aims. She does suggest that researchers mix methods *within* a paradigm. Triangulation *across* methods, which Leininger describes as 'multi-angulation', violates the integrity of both methodologies in her view. Clarke (1995) advises against using multiple methodologies for more practical reasons. He states that this produces a 'diffused picture' because of the lack of consistency and adequacy in analysis.

The practical angle should be considered: in a small undergraduate project a single method approach is less time consuming and gives an opportunity for in-depth use of the method. Creswell (1994) recommends that studies be based on a single paradigm, not only because of the limitations of time and size of the research, but also because each methodology has its roots in a particular worldview. Qualitative methods and procedures are appropriate to research some situations and problems, quantitative methods for others. Researchers must choose the methodology and methods which best suit the research question or topic. Depending on a particular project – triangulation between methods may be appropriate.

Nurse and midwife researchers rarely adopt the purist stance but are more pragmatic. They do not necessarily see a conflict or follow an extremist view, a standpoint irrelevant in nursing research. Evaluators of qualitative or quantitative methods must remember to judge each piece of work on its own terms within the specific approach taken. This becomes particularly important advice for qualitative research that is often evaluated by the use of criteria appropriate for quantitative methods. Hutchinson and Webb (1991: 311) note that 'qualitative research is not a substitute for quantitative inquiry. The two modes of research are not in competition.' Each has to be consistent within itself and fit the research topic or problem.

Mixing methods

Sometimes researchers employ the two methodologies which have their roots in distinctively different views of the world, not for validating the results of one through the other, but for different reasons, for instance, to gain a variety of information, to illuminate a particular problem from different angles, or to look at different aspects of a phenomenon. DePoy and Gitlin (1993) describe the three basic techniques for mixing methods: The *nested*, the *sequential* and the *parallel* strategies.

(1) When using the nested strategy, researchers choose a main framework and methodology to develop their research and then add a technique from another methodology. For instance, a nurse might employ participant observation and then conduct a survey on a particular issue that arose during the data collection or in the findings.
(2) Sequential strategies can also be used. They are the most common approaches to mixing methods. Nurses, for example, often use qualitative techniques, such as unstructured interviewing, as a first step in research to explore an issue. On the basis of these interviews they develop a hypothesis and construct a questionnaire for a large survey. Sometimes, on the other hand, a study starts with a quantitative approach that examines facts, and a qualitative strategy is added to explore feelings and perceptions that have not been explored before in depth.
(3) The parallel approach makes use of the qualitative and the quantitative at the same time while valuing both equally so that the topic can be illuminated from all sides.

Method slurring

Qualitative research includes a variety of diverse approaches for the collection or analysis of data, based on different philosophical positions and rooted in various disciplines. Some are in fact philosophies rather than methods of data collection and/or analysis – for instance phenomenology – others present approaches to data collection, analysis and theorising such as grounded theory and ethnography. Yet others are textual analyses like discourse and conversation analysis. Even within a single method different schools compete with each other and their followers sometimes take a strong position.

Students cannot always differentiate between methods, and some expert researchers strongly argue against 'slurring' or 'muddling' them (Boyle *et al*., 1991; Baker *et al*., 1992). These writers point out that each approach in qualitative research has its own assumptions and procedures. Morse (1994) stresses that, among other factors, application and use differentiate methods and give each approach its unique character. A researcher using one of the methods should make sure that language, philosophy and strategies 'fit' the chosen approach. Commonalities do exist, of course. Most of these approaches focus on the experiences of human beings and the perspectives of the participants, interpreted by the researcher. They uncover meanings that people give to their experiences. Most of these types of research result ultimately in a coherent story with a strong storyline.

The reasons for qualitative nursing and midwifery research

Qualitative researchers adopt a person-centred and holistic perspective. The approach helps develop an understanding of human experiences, which is

important for health professionals who focus on caring, communication and interaction. Through this perspective, nurse and midwife researchers gain knowledge and insight about human beings – be they patients, colleagues or other professionals. Researchers generate in-depth accounts that present a lively picture of the participants' reality. They focus on human beings within their social and cultural context, not just on specific clinical conditions or professional and educational tasks. Qualitative nursing and midwifery research is in tune with the nature of the phenomena examined; emotions, perceptions and actions are qualitative experiences.

One could claim that a 'fit' exists between nursing philosophy and qualitative research. The essence of modern nursing contains elements of commitment and patience, understanding and trust, give and take, flexibility and openness (Paterson, 1978). These traits mirror those of qualitative inquiry. Indeed, flexibility and openness are as essential in qualitative study as they are in the tasks of the health worker. In the clinical arena too, health professionals often have to backtrack, return to the situation and try something new, because the situation is constantly evolving.

Health professionals have long recognised that individuals are more than diagnostic cases (Leininger, 1985), and therefore research must focus on the whole person rather than merely on physical parts. The researcher, taking a holistic view, observes people in their natural environment, and the researcher–informant relationship is based on trust and openness. Both professional caring and qualitative research depend on knowledge of the social context. The settings in which individuals live or stay for a time, the social support they have, and the people with whom they interact, have a powerful effect on their lives as well as on health and illness.

Built-in ethical issues exist in both caring and qualitative research. Health professionals and qualitative researchers are ethically bound to act in the interest of clients or participants in the setting and to empower them to make autonomous decisions. This does not mean that conventional forms of inquiry have no ethical basis; however, the closer relationships forged in qualitative research enable researchers to be more focused on ethical values and achieve empathy with the participants (*not* subjects) in the research. These relationships also help nurses and midwives be more aware that their clients are human beings and not just body parts.

In their assessment, nurses and midwives use inductive thinking before coming to conclusions, piecing together the full picture of the patient's or client's condition from specific observations and individual pieces of information. Listening carefully and asking relevant questions without being judgemental enables them to gain insights into problems and deeper understanding of the people with whom they interact. Qualitative research too, proceeds from collecting specific data to more general conclusions.

What methodology in nursing and midwifery research?

Adopting approaches because researchers find them easy or more interesting is not an appropriate way of doing research. Methodology and procedures depend on

- The nature and type of the research question or problem
- The epistemological stance of the researcher
- The skills and training of the researcher
- The resources available for the research project

> The methodology nurse and midwife researchers choose should depend on their intentions and goals. The research question, the ideas and the skills of the researcher determine the research approach and the procedures adopted.

Researchers do have to think of the practicalities of the research such as their own competence and interest, the scope of the research and available funds and resources, all factors that influence the undertaking of a project. A qualitative methodology is generally applied in healthcare settings when the focus is on feelings, experience and thoughts, change and conflict.

The research methodology and the methods inherent in it are not the only consideration for researchers though. We believe that 'methodolatry', about which Janesick (2000: 390) warns us, is a danger in any research. Methodolatry means an obsession with method without reflection, an overemphasis on the method rather than substance of the research. This can lead to distancing from participants by valuing method over their thoughts and ideas.

Nurses and other health professionals do not use qualitative approaches without reflection and evaluation. To be of value to health care, a critical and rigorous stance is necessary. We support the tenets of Atkinson, Coffey and Delamont (2001: 5)

> 'As qualitative research methods achieve ever-wider currency . . . we need to apply a critical and reflexive gaze. We cannot afford to let qualitative research become a set of taken for granted precepts and procedures. Equally, we should not be so seduced by our collective success or radical chic of new strategies of social research as to neglect the need for methodological rigour.'

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