4th Edition

Introduction to Qualitative Research Methods

A Guidebook and Resource

Steven J. Taylor
Robert Bogdan
Marjorie L. DeVault

WILEY

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Fourth Edition

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During the revision of this book, Steven J. Taylor was diagnosed with terminal cancer. He continued to contribute to and guide this edition of Introduction to Qualitative Research Methods *to the end. We dedicate this book to him and his legacy.*

—Robert Bogdan and Marjorie L. DeVault

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In writing the first edition of this book and in subsequent editions, we have drawn on the experience and knowledge of early qualitative researchers, some of whom conducted their research in an era when their preferred approach was in disfavor. We value their commitment to the faithful

reporting of what they heard and saw in the field, knowing that researchers can never capture the actual nature of reality. We also have learned from the epistemological and theoretical challenges to traditional ethnography and qualitative methodology raised by researchers since the 1970s. We believe that much is to be learned from these challenges and hope that qualitative researchers will continue to use them to strengthen their own studies in the future.

Steven J. Taylor
Robert Bogdan
Marjorie L. DeVault
Syracuse University

Part One

Among the People: How to Conduct Qualitative Research

Chapter 1
Introduction: Go to the People

A Note on the History of Qualitative Methods

Qualitative Methodology

Theory and Methodology

Notes

The term *methodology* refers to the way in which we approach problems and seek answers. In the social sciences, the term applies to how research is conducted. Our assumptions, interests, and purposes shape which methodology we choose. When stripped to their essentials, debates over methodology are debates over assumptions and purposes, over theory and perspective.

Two major theoretical perspectives have dominated the social science scene (Bruyn, 1966; Deutscher, 1973; also see Creswell, 2012; Saldaña, 2011).[1] The first, positivism, traces its origins in the social sciences to the great theorists of the 19th and early 20th centuries and especially to Auguste Comte (1896) and Émile Durkheim (1938, 1951). The positivist seeks the facts or causes of social phenomena apart from the subjective states of individuals. Durkheim (1938, p. 14) told the social scientist to consider social facts, or social phenomena, as “things” that exercise an external influence on people.

The second major theoretical perspective, which, following the lead of Deutscher (1973), we describe as phenomenological, has a long history in philosophy and sociology (Berger & Luckmann, 1967; Bruyn, 1966; Husserl, 1962; Psathas, 1973; Schutz, 1962, 1966). The

phenomenologist, or interpretivist (Ferguson, Ferguson, & Taylor, 1992), is committed to understanding social phenomena from the actor's own perspective and examining how the world is experienced. The important reality is what people perceive it to be. Jack Douglas (1970, p. ix) wrote, “The ‘forces’ that move human beings, as human beings rather than simply as human bodies…are ‘meaningful stuff.’ They are internal ideas, feelings, and motives.”

Since positivists and phenomenologists take on different kinds of problems and seek different kinds of answers, their research requires different methodologies. Adopting a natural science model of research, the positivist searches for causes through methods, such as questionnaires, inventories, and demography, that produce data amenable to statistical analysis. The phenomenologist seeks understanding through qualitative methods, such as participant observation, in-depth interviewing, and others, that yield descriptive data. In contrast to practitioners of a natural science approach, phenomenologists strive for what Max Weber (1968) called *verstehen*, understanding on a personal level the motives and beliefs behind people's actions (Hennink, Hutter, & Bailey, 2011).

This book is about qualitative methodology—how to collect descriptive data, people's own words, and records of people's behavior. It is also a book on how to study social life phenomenologically. We are not saying that positivists cannot use qualitative methods to address their own research interests: Durkheim (1915) used rich descriptive data collected by anthropologists as the basis for his treatise *The Elementary Forms of Religious Life*. We are saying that the search for social causes is neither what this book is about nor where our own research interests lie.

We return to the phenomenological or interpretivist perspective later in this chapter, for it is at the heart of this work. It is the perspective that guides our research.

A Note on the History of Qualitative Methods

Descriptive observation, interviewing, and other qualitative methods are as old as recorded history (R. H. Wax, 1971). Wax pointed out that their origins can be traced to historians, travelers, and writers ranging from the Greek Herodotus to Marco Polo. It was not until the 19th and early 20th centuries, however, that what we now call qualitative methods were consciously employed in social research (Clifford, 1983).

Frederick LePlay's 1855 study of European families and communities stands as one of the first genuine pieces of qualitative research (Bruyn, 1966). Robert Nisbet (1966) wrote that LePlay's research represented the first scientific sociological research:

> But *The European Working Classes* is a work squarely in the field of sociology, the first genuinely scientific sociological work in the century… Durkheim's *Suicide* is commonly regarded as the first “scientific” work in sociology, but it takes nothing away from Durkheim's achievement to observe that it was in LePlay's studies of kinship and community types in Europe that a much earlier effort is to be found in European sociology to combine empirical observation with the drawing of crucial inference—and to do this acknowledgedly within the criteria of science. (p. 61)

In anthropology, field research came into its own around the turn of the century. Boas (1911) and Malinowski (1932) can be credited with establishing fieldwork as a legitimate

anthropological endeavor. As R. H. Wax (1971, pp. 35–36) noted, Malinowski was the first professional anthropologist to provide a description of his research approach and a picture of what fieldwork was like. Perhaps due to the influence of Boas and Malinowski, in academic circles field research or participant observation has continued to be associated with anthropology.

We can only speculate on the reasons why qualitative methods were so readily accepted by anthropologists and ignored for so long by sociologists and other social researchers. Durkheim's *Suicide* (1897/1951), which equated statistical analysis with scientific sociology, was extremely influential and provided a model of research for several generations of sociologists. It would be difficult for anthropologists to employ the research techniques, such as survey questionnaires and demographics, that Durkheim and his predecessors developed: We obviously cannot enter a preindustrial culture and ask to see the police blotter or administer a questionnaire. Further, whereas anthropologists are unfamiliar with and hence deeply concerned with everyday life in the cultures they study, sociologists probably take it for granted that they already know enough about the daily lives of people in their own societies to decide what to look at and which questions to ask.

Yet qualitative methods have a rich history in American sociology. The use of qualitative methods first became popular in the studies of the Chicago school of sociology in the period from approximately 1910 to 1940 (Bulmer, 1984; Corbin & Strauss, 2008). During this period, researchers associated with the University of Chicago produced detailed participant observation studies of urban life (N. Anderson, *The Hobo*, 1923; P. G. Cressey, *The Taxi-Dance Hall*, 1932; Thrasher, *The Gang*, 1927; Wirth, *The Ghetto*, 1928; Zorbaugh, *The Gold Coast and the Slum*, 1929); rich

life histories of juvenile delinquents and criminals (Shaw, *The Jack-Roller*, 1930; Shaw, *The Natural History of a Delinquent Career*, 1931; Shaw, McKay, & McDonald, *Brothers in Crime*, 1938; Sutherland, *The Professional Thief*, 1937); and a classic study of the life of immigrants and their families in Poland and America based on personal documents (W. I. Thomas & Znaniecki, *The Polish Peasant in Europe and America*, 1927). Up until the 1940s, people who called themselves students of society were familiar with participant observation, in-depth interviewing, and personal documents.

As important as these early studies were, interest in qualitative methodology waned toward the end of the 1940s and beginning of the 1950s with the growth in prominence of grand theories (e.g., Parsons, 1951) and quantitative methods. With the exception of W. F. Whyte's (1943, 1955, 1981, 1993) *Street Corner Society*, few qualitative studies were taught and read in social science departments during this era.

Since the 1960s there has been a reemergence in the use of qualitative methods, and qualitative methodologies have moved in new directions (see DeVault, 2007 for an overview). So many powerful, insightful, and influential studies have been published based on these methods (e.g., E. Anderson, 1990, 1999, 2011; Becker, 1963; Duneier, 1999; Erikson, 1976; Hochschild, 1983; Kang, 2010; Lareau, 2001; Liebow, 1967; Thorne, 1993; Vaughan, 1997) that they have been impossible to discount. What was once an oral tradition of qualitative research has been recorded in monographs (Berg & Lune, 2011; Corbin & Strauss, 2008; Creswell, 2012, 2014; Dewalt & Dewalt, 2002; Emerson, Fretz, & Shaw, 2011; Esterberg, 2001; Lincoln & Guba, 1985; Lofland, 1971, 1976; Lofland & Lofland, 1995; Riessman, 2008; Saldaña, 2011; Schatzman & Strauss, 1973; Silverman, 2013; Spradley, 1979, 1980; Stake, 1995;

ten Have, 2004; Van Maanen, Dabbs, & Faulker, 1982; C. A. B. Warren & Karner, 2014; W. F. Whyte, 1984; Yin, 2011, 2014) and edited volumes (Denzin & Lincoln, 2011; Emerson, 1983; Filstead, 1970; Glazer, 1972; Luttrell, 2010; McCall & Simmons, 1969; Van Maanen, 1995). There also have been books published that examine the philosophical underpinnings of qualitative research (Bruyn, 1966; Denzin & Lincoln, 1994, 2011; Hesse-Biber & Leavy, 2011; Prasad, 2005), relate qualitative methods to theory development (Charmaz, 2014; Clarke, 2005; Corbin & Strauss, 2008; Glaser & Strauss, 1967; Miles, Huberman, & Saldaña, 2014; Prus, 1996; Saldaña, 2013; Strauss & Corbin, 1990), describe writing strategies for reporting qualitative research (Becker, 2007; Richardson, 1990b; Van Maanen, 1988; Wolcott, 2009), and contain personal accounts of researchers' experiences in the field (Douglas, 1976; Fenstermaker & Jones, 2011; Hertz, 1997; J. M. Johnson, 1975; Shaffir & Stebbins, 1991; Shaffir, Stebbins, & Turowetz, 1980; R. H. Wax, 1971). In sociology alone, there are journals devoted to publishing qualitative studies (*Journal of Contemporary Ethnography*, *Qualitative Sociology*) and to qualitative inquiry generally (*International Review of Qualitative Research*, *Qualitative Inquiry*). Sage Publications produced short monographs on different slices of qualitative research starting in 1985 (edited by Van Maanen, Manning, and Miller), and the number reached nearly 50. Interest in qualitative methodology has grown so much that several publishers have produced encyclopedic handbooks on qualitative methods generally and on particular branches of qualitative inquiry (Atkinson, Coffey, Delamont, Lofland, & Lofland, 2007; Denzin & Lincoln, 2011; Denzin, Lincoln, & Smith, 2008; Gubrium, Holstein, Marvasti, & McKinney, 2012; Jones, Adams, & Ellis, 2013).

Paralleling the growing interest in qualitative research in sociology has been an increased acceptance of these methods in other disciplines and applied fields. Such diverse disciplines as geography (DeLyser, Herbert, Aitken, Crang, & McDowell, 2010; Hay, 2010), political science (McNabb, 2004), and psychology (Camic, Rhodes, & Yardley, 2003; Fischer, 2005; *Qualitative Research in Psychology*) have seen the publication of edited books, texts, and journals on qualitative research methods over the past decade and a half. The American Psychological Association started publishing the journal *Qualitative Psychology* in 2014. Qualitative methods have been used for program evaluation and policy research (Bogdan & Taylor, 1990; Guba & Lincoln, 1989; M. Q. Patton 1987, 2008, 2010, 2014; Rist 1994). Journals and texts on qualitative research can be found in such diverse applied areas of inquiry as health care and nursing (Latimer, 2003; Munhall, 2012; Streubert & Carpenter, 2010; *Qualitative Health Research*), mental health, counseling, and psychotherapy (Harper & Thompson, 2011; McLeod, 2011), education (Bogdan & Biklen, 2006; *International Journal of Qualitative Studies in Education*; Lichtman, 2010; *Qualitative Research in Education*), music education (Conway, 2014), public health (Ulin, Robinson, & Tolley, 2005), business (Meyers, 2013), theology (Swinton & Mowat, 2006), disability studies (Ferguson et al., 1992), human development (Daly, 2007; Jessor, Colby, & Shweder, 1996), social work (Sherman & and Reid, 1994; *Qualitative Social Work*), and special education (Stainback & Stainback, 1988).

One does not have to be a sociologist or to think sociologically to practice qualitative research. Although we identify with a sociological tradition, qualitative approaches can be used in a broad range of disciplines and fields.

Just as significant as the increasing interest in qualitative research methods has been the proliferation of theoretical perspectives rooted in the phenomenological tradition underlying this form of inquiry. We consider the relationship between theory and methodology more fully later in this chapter.

Qualitative Methodology

The phrase *qualitative methodology* refers in the broadest sense to research that produces descriptive data—people's own written or spoken words and observable behavior. As Ray Rist (1977) pointed out, qualitative methodology, like quantitative methodology, is more than a set of data-gathering techniques. It is a way of approaching the empirical world. In this section we present our notion of qualitative research.

1. *Qualitative researchers are concerned with the meaning people attach to things in their lives*. Central to the phenomenological perspective and hence qualitative research is understanding people from their own frames of reference and experiencing reality as they experience it (Corbin & Strauss, 2008). Qualitative researchers empathize and identify with the people they study in order to understand how those people see things. Herbert Blumer (1969) explained it this way:

   > To try to catch the interpretative process by remaining aloof as a so-called “objective” observer and refusing to take the role of the acting unit is to risk the worst kind of subjectivism—the objective observer is likely to fill in the process of interpretation with his[2] own surmises in place of catching the process as it occurs in the experience of the acting unit which uses it. (p. 86)

As suggested by Blumer's quote, qualitative researchers must attempt to suspend, or set aside, their own perspectives and taken-for-granted views of the world. Bruyn (1966) advised the qualitative researcher to view things as though they were happening for the first time. Nothing is taken for granted. Psathas (1973) wrote:

> For the sociologist, a phenomenological approach to observing the social world requires that he break out of the natural attitude and examine the very assumptions that structure the experience of actors in the world of everyday life. A method that provides assistance in this is “bracketing” the assumptions of everyday life. This does not involve denying the existence of the world or even doubting it (it is not the same as Cartesian doubt). Bracketing changes my attitude toward the world, allowing me to see with clearer vision. I set aside preconceptions and presuppositions, what I already “know” about the social world, in order to discover it with clarity of vision. (pp. 14–15)

2. *Qualitative research is inductive*. Qualitative researchers develop concepts, insights, and understandings from patterns in the data rather than collecting data to assess preconceived models, hypotheses, or theories. Glaser and Strauss (1967) coined the phrase “grounded theory” to refer to the inductive theorizing process involved in qualitative research that has the goal of building theory. A theory may be said to be grounded to the extent that it is derived from and based on the data themselves. Lofland (1995) described this type of theorizing as “emergent analysis” and pointed out that the process is creative and intuitive as opposed to mechanical.

In qualitative studies, researchers follow a flexible research design (Marshall & Rossman, 2011). We begin our studies with only vaguely formulated research questions. However we begin, we do not know for sure what to look for or what specific questions to ask until we have spent some time in a setting. As we learn about a setting and how participants view their experiences, we can make decisions regarding additional data to collect on the basis of what we have already learned.

Of course, qualitative researchers operate within theoretical frameworks. Pure induction is impossible (Ritchie, Lewis, Nicholls, & Ormston, 2013). We can never escape all of our assumptions about the world, and we all approach our research with some goals and questions in mind. Even an interest in social meanings directs our attention to some aspects of how people think and act in a setting and not to others. Within a broad theoretical framework, the goal of qualitative research is to make sure the theory fits the data and not vice versa.

DeVault (1995b) cautioned against taking the principles of Glaser and Strauss's grounded theory approach too literally. As she pointed out, what is missing from the data may be just as important for theorizing as what is there. For the purposes of inductive reasoning, it is important to be sensitive to unstated assumptions and unarticulated meanings.

3. *In qualitative methodology the researcher looks at settings and people holistically; people, settings, or groups are not reduced to variables, but are viewed as a whole*. The qualitative researcher studies people in the context of their pasts and the situations in which they find themselves (Marshall & Rossman, 2011; Tracy, 2013; Yin, 2011).

When we reduce people's words and acts to statistical equations, we can lose sight of the human side of social life. When we study people qualitatively, we get to know them personally and experience what they experience in their daily struggles in society. We learn about concepts such as beauty, pain, faith, suffering, frustration, and love, whose essence is lost through other research approaches. We learn about "the inner life of the person, his moral struggles, his successes and failures in securing this destiny in a world too often at variance with his hopes and ideals" (Burgess, as quoted by Shaw [1930/1966, p. 4]).

4. *Qualitative researchers are concerned with how people think and act in their everyday lives*. Qualitative research has been described as naturalistic (Lincoln & Guba, 1985). This means that researchers adopt strategies that parallel how people act in the course of daily life, typically interacting with informants in a natural and unobtrusive manner (Rossman & Rallis, 2012). In participant observation, most researchers try to "blend into the woodwork," at least until they have grasped an understanding of a setting. In qualitative interviewing, researchers model their interviews after a normal conversation rather than a formal question-and-answer exchange. Although qualitative researchers cannot eliminate their effects on the people they study, they attempt to minimize or control those effects or at least understand them when interpreting data (Emerson, 1983).
5. *For the qualitative researcher, all perspectives are worthy of study*. The qualitative researcher rejects what Howard Becker (1967) referred to as the "hierarchy of credibility"; namely, the assumption that the perspectives of powerful people are more valid than those of the powerless. The goal of qualitative research

is to examine how things look from different vantage points. The student's perspective is just as important as the teacher's; the juvenile delinquent's as important as the judge's; the so-called paranoid's as important as the psychiatrist's; the homemaker's as important as the breadwinner's; that of the African American (Puerto Rican, Mexican, Vietnamese American, Haudenosaunee, etc.) as important as that of the European American (English, Swedish, Italian, Irish, Polish, etc.); that of the researched as important as the researcher's.

In qualitative studies, those whom society ignores—the poor and the so-called deviant—often receive a forum for their views. Oscar Lewis (1965, p. xii), famous for his studies of the poor in Latin America, wrote, “I have tried to give a voice to a people who are rarely heard.” Ironically, although Lewis's studies were filled with rich descriptions, his interpretations of the people he studied blamed their “culture” for the social inequalities they faced.

6. *Qualitative researchers emphasize the meaningfulness of their research*. Qualitative methods allow us to stay close to the empirical world (Blumer, 1969). They are designed to ensure a close fit between the data and what people actually say and do. By observing people in their everyday lives, listening to them talk about what is on their minds, and looking at the documents they produce, the qualitative researcher obtains firsthand knowledge of social life unfiltered through operational definitions or rating scales.

   Whereas qualitative researchers emphasize the meaningfulness of their studies—or what some people term *validity* (Deutscher, Pestello, & Pestello, 1993)—quantitative researchers emphasize reliability and replicability in research (Rist, 1977). As Deutscher et

al. (1993, p. 25) wrote, reliability has been overemphasized in social research:

> We concentrate on whether we are consistently right or wrong. As a consequence we may have been learning a great deal about how to pursue an incorrect course with a maximum of precision.

This is not to say that qualitative researchers are unconcerned about the accuracy of their data. A qualitative study is not an impressionistic, off-the-cuff analysis based on a superficial look at a setting or people. It is a piece of systematic research conducted with demanding, though not necessarily standardized, procedures. In the chapters that follow, we discuss some of the checks researchers can place on their data recording and interpretations. However, it is not possible to achieve perfect reliability if we are to produce meaningful studies of the real world. LaPiere (quoted in Deutscher et al., 1993) wrote:

> The study of human behavior is time consuming, intellectually fatiguing, and depends for its success upon the ability of the investigator… Quantitative measurements are quantitatively accurate; qualitative evaluations are always subject to the errors of human judgment. Yet it would seem far more worthwhile to make a shrewd guess regarding that which is essential than to accurately measure that which is likely to prove irrelevant. (p. 19)

7. *For the qualitative researcher, there is something to be learned in all settings and groups*. No aspect of social life is too mundane or trivial to be studied. All settings and people are at once similar and unique. They are similar in the sense that some general social processes may be found in any setting or among any group of people. They are unique in that some aspect of social life