
MIXED METHODS RESEARCH IN POVERTY AND VULNERABILITY
Sharing Ideas and Learning Lessons
Edited by
Keetie Roelen and Laura Camfield

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1
Introduction

Keetie Roelen and *Laura Camfield*

Background

The use of mixed methods in researching poverty and vulnerability and evaluation of interventions in this field has expanded rapidly in the last few years. The added value of mixed methods research in analysing poverty and vulnerability has now been widely acknowledged (see Shaffer 2013, Stern et al. 2012). Much work has been undertaken with respect to meaningfully combining methods at various stages in the research process – from generating data to analysis and reporting – and reflections thereon have led to mixed methods not only having become more 'mainstream' but also more robust and of greater quality. Despite an exponential growth of studies using mixed methods research in the last decade, gaps and challenges remain.

A workshop on mixed methods research in poverty and vulnerability held in London in July 2013 brought together academics, practitioners and consultants from developing and developed countries to share ideas and learn lessons about the use of mixed methods approaches in this particular area of study. A number of themes emerged in terms of where more advances are to be made, namely *credibility*, *complexity* and *usability*. This edited volume provides reflections on various issues within these themes, largely based on practical applications in research and evaluation. The collection includes contributions from different disciplinary perspectives and holds considerations on the process of data collection as well as the use of data for analytical and policy purposes.

In this introduction, we will discuss each of the three emerging themes and how they are covered in the contributions in this volume.

Credibility

Although mixed methods research in poverty and vulnerability may have firmly established itself as a valuable contribution to development studies, it still lacks *credibility* in many areas of academia. This holds particularly true for academics studying poverty and vulnerability from a singular disciplinary perspective such as economics (Shaffer 2013). Underlying this scepticism might be the epistemological clashes when trying to combine data and methods grounded in different disciplinary backgrounds. The field of impact evaluation has been particularly liable to such a divide, where quantitatively focused 'randomistas' often find themselves on the opposite side of heterodox quantitative, qualitative and Participatory Rural Appraisal (PRA)-influenced researchers (Bamberger et al. 2010). There may also be concerns relating to the rigour of mixed methods research given that few people are expert in both qualitative and quantitative data generation and analysis. This renders conventional guidelines for assessing quality insufficient. For example, Camfield (2014) notes that the mixing of methods requires an engagement with the metanarratives' underlying assumptions about the topic under investigation and, therefore, with the epistemological understandings that shape those assumptions.

Considerations for improving credibility in mixed methods research, as well as the ways in which mixed methods approaches can make research more credible, are central to many contributions in this volume. From an epistemological perspective, a more explicit consideration of how different disciplinary backgrounds enter mixed methods approaches and shape the subsequent research design allows the researcher to extend beyond the implicit assumptions and methodological choices that are rooted in such disciplinary backgrounds. At the same time, greater reflection on disciplinary considerations that feed into the design of mixed methods approaches may allow users of research to overcome their own epistemological qualms. Edmiston (Chapter 3, this volume) shows how distinct citizenship theories and concepts of relative deprivation can be meaningfully and credibly combined through the study of lived experience, furthering our understanding of poverty and vulnerability in light of social, economic and cultural relations. Fahmy, Sutton and Pemberton (Chapter 2, this volume) highlight how consensus about 'necessities of life' is interpreted differently from quantitative and qualitative perspectives and that more deliberative methods are required for understanding public views on necessities.

Methodological opportunities for making analysis and presentation of findings more robust across a spread of methods, grounded in different disciplinary backgrounds, includes the role of methodological bilingualism by ensuring that the research team has experts from each of these backgrounds (Torres Penagos and Bautista Hernández, Chapter 8, this volume). The importance of combined use of methods and assigning equal weight to such methods is also considered imperative in overcoming epistemological and methodological divides and for adding credibility to the overall findings (Dawson, Chapter 4; Torres Penagos and Bautista Hernández). Finally, an issue often overlooked yet crucial for collecting credible and high-quality data is that of the positionality of researchers and the research-respondent relationships (Dawson). With respect to impact evaluation, Copestake and Remnant (Chapter 6, this volume) consider issues that tend to undermine its credibility, including the challenges of attribution and establishing external validity and systematic biases such as confirmation and pro-project bias. They conclude that greater emphasis on qualitative methods and the use of mixed method approaches might be most appropriate in addressing such issues.

Complexity

The use of mixed methods in research on poverty and vulnerability grounded in complexity frameworks is limited. This is despite growing recognition that pathways out of poverty are anything but linear, forcing us to think beyond direct impacts from single interventions and acknowledge 'the multiplicity of contributions to development outcomes' (Befani et al. 2014, p. 3). In a longitudinal mixed methods study in Bangladesh, Davis and Baulch (2011) found that household wealth can follow a range of trajectories, most of which are non-linear. Similarly, in a longitudinal study of 20 Ethiopian communities, the use of case-based methods for investigating changes over time showed communities to be 'dynamic open complex systems' (Bevan 2014).

Yet many studies appear to adopt the view of livelihood systems being clearly demarcated and delineated structures, and of poverty dynamics being linear processes. Evaluation studies appear particularly prone to such over-simplification. But as indicated by Picciotto (2014), while experimental impact evaluations may be able to attribute impact to an intervention, they are not able to answer questions about whether the intervention was appropriate, relevant or efficient. Pradel et al. (2013) argue that an outcome evaluation approach – focusing on proximate outcomes rather than impacts – is better suited to reflect both the complex

contexts in which interventions take place and the many factors that lead to change. Mixed methods research can make an important contribution to studies that analyse poverty and vulnerability as complex and overlapping states, as opposed to delineated and linear processes. This includes evaluations of programmes and their contributions to poverty reduction and improved livelihoods.

The notion of complexity and the role of mixed methods in addressing such complexity is a key theme in contributions throughout this volume. Copestake and Remnant argue for the pursuit of realism in impact evaluations and therefore for a more balanced integration of methods, realising that confounding factors in such evaluations are too plentiful and change too rapidly for purely experimental quantitative evaluation designs. The contribution by Devereux and Roelen (Chapter 7, this volume) is based on precisely this premise: that programme impacts are non-linear, particularly when considering social dynamics and 'true impacts' over a longer period of time. They argue that mixed methods approaches are crucial in unpacking that complexity.

Relationships form an important element of this complexity. The importance of relationships as an inherent but often overlooked factor in understanding poverty and wellbeing, and the role for mixed methods approaches in unpacking such relationships, is emphasised in several contributions in this volume. Edmiston reveals how an integrated study of deprivation and citizenship arrangements by combining quantitative data on objective and subjective measures of deprivation with lived experiences is crucial for unpacking the complex dynamics of deprivation at the micro-level within the context of macro-level socio-economic relations. McGregor, Camfield and Coulthard (Chapter 10, this volume) argue for the importance of using human wellbeing as a measure of development, partly on the premise that relationships are core to human wellbeing and a neglect of this dimension would obscure the complexities underlying the process of development. The use of mixed methods is considered vital for moving beyond simplistic and static understandings of wellbeing and thereby development.

Usability

Despite the additional insight and texture that mixed methods studies offer to the issues of poverty and vulnerability, policymakers often remain sceptical of such studies (for reasons discussed above) (Shaffer 2013) and subsequently make limited use of them. However, as pointed out by Sorde Marti and Mertens (2014), social scientists not only have a responsibility to identify problems and provide insight into them and

the processes leading up to them, but also to offer suggestions on how to respond to or solve those problems – to work towards 'transformative social change'. Usability of mixed methods studies could be increased by introducing action research elements or by responding more directly to the information needs of policymakers when choosing methods and presenting findings.

Various chapters in this volume show how mixed methods studies can be user-friendly and meaningfully contribute to scientific and policy debates. Dawson shows how 'conventional poverty measures' provide a picture of development that may not necessarily resonate with those experiencing the effects of these policies. The mixed methods study juxtaposes findings following 'conventional poverty measures' and people's own perceptions. Clear reference to information from both types of data and their contrasting insights makes the study more policy amenable. Torres Penagos and Bautista Hernández illustrate how the integration of data and methods at the municipal level generates information that is relevant for policymakers at that level, thereby facilitating policy uptake and shortening the linkages between evidence and policy impact. Finally, Burrows and Read (Chapter 9, this volume) discuss how an organisation-wide evaluation protocol can ensure that findings from country-specific mixed methods studies lead to greater policy uptake by the organisation's managers.

This volume

As the three themes discussed above appear across the different chapters, this volume is structured around three main topics of study, clustering chapters into (i) poverty measurement, (ii) evaluation research and (iii) from research to policy. Within these three sections, individual chapters link to the knowledge gaps and challenges with respect to mixed methods research in poverty and vulnerability as discussed above. Contributions present case studies from developed and developing country contexts and applications of different approaches to mixed methods research, offering substantive findings and reflections following their use.

Section I pertains to studies regarding poverty measurement, including how mixed methods research can contribute to interpreting measures of 'necessities of life' in the United Kingdom (Fahmy, Sutton and Pemberton, Chapter 2), understanding deprivation and social citizenship in the UK (Edmiston, Chapter 3), contrasting pictures of development and poverty reduction in Rwanda (Dawson, Chapter 4), and vulnerability and resilience in Burkina Faso (Tincani and Poole,

Chapter 5). Section II offers reflections from impact and evaluation research, following the proposition of a new evaluation protocol for examining the impact of rural interventions (Copestake and Remnant, Chapter 6) and elaboration on an alternative evaluation framework in the area of social protection (Devereux and Roelen, Chapter 7). Section III covers contributions concerned with research for policy, sharing reflections from a multidimensional poverty study in a small municipality in Colombia (Torres Penagos and Bautista Hernández, Chapter 8), a cross-organisation evaluation of interventions in protracted refugee situations by the World Food Programme (WFP) (Burrows and Read, Chapter 9), and deliberations about the place of mixed methods in a human wellbeing approach to development (McGregor, Camfield and Coulthard, Chapter 10).

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Section I
Poverty Measurement

2

Mixed Methods in Poverty Measurement: Qualitative Perspectives on the 'Necessities of Life' in the 2012 PSE-UK Survey[1]

Eldin Fahmy, Eileen Sutton and *Simon Pemberton*

Introduction

Recent years have witnessed growing interest in the applications of mixed methods research strategies and specifically in the integration of qualitative and quantitative perspectives within social research. As a result, advocacy of mixed methods strategies has become increasingly accepted in research on the international analysis of poverty and vulnerability. However, despite its growing appeal in global poverty research within the United Kingdom, poverty research mixed methods designs remain rare with limited dialogue between proponents of qualitative and quantitative approaches. This partly reflects the persistence of long-standing methodological controversies in the applications of mixed methods approaches in poverty research. Combining data derived from multiple sources and generated using different data collection methods therefore continues to raise important conceptual, epistemological and methodological challenges in poverty measurement. In this chapter we illustrate some of these issues by drawing on qualitative development work undertaken as part of the 2012 UK Poverty and Social Exclusion Survey (PSE-UK) comprising a series of 14 focus group discussions in different locations in the UK. In doing so, we seek to illustrate the potential applications of qualitative evidence on poverty in assessing the credibility of evidence derived using large-scale survey methods.

The 2012 PSE-UK study is the latest and most comprehensive in a series of household surveys conducted since the 1980s adopting a 'consensual' approach to poverty measurement based on public perceptions of minimally adequate living standards. Consensual approaches to poverty measurement are now widely adopted in large-scale survey research both in the UK and internationally. However, determining the extent

and nature of public agreement on the items and activities constituting 'necessities of life' is not straightforward. In this chapter we consider the contribution of qualitative perspectives in understanding the public's views on this issue in the UK today and discuss the implications of our findings for empirical poverty measurement using social survey methods. Our findings suggest that public understandings of the term 'necessity' are diverse and may not always be consistent with researchers' interpretations, or with current usage in survey-based measurement. These findings have important implications for how we should interpret 'consensus' within survey-based consensual poverty measures, and we conclude by considering the wider methodological and epistemological implications of these findings in relation to research on poverty and vulnerability.

Mixed methods approaches in poverty research: Bridging the methodological divide?

The logic of mixed methods enquiry

Recent years have witnessed an increasing rapprochement between advocates of qualitative and quantitative methods in the practical conduct of social research, including in international research on poverty and development. Advocates of multi-method approaches have long argued that a tendency to view research methods in terms of polarised opposites (i.e. qualitative vs quantitative) encourages a methodological parochialism which frustrates our attempts to adequately address substantive research problems (e.g. Bryman, 1988; Brewer and Hunter, 1989; Tashakkori and Teddlie, 1998). As Hammersley (1992: 52) argues, the idea of a fundamental methodological divide exaggerates the differences between qualitative and quantitative approaches, and underplays the diversity of assumptions, strategies and techniques which underpin social research – a diversity which does not correspond closely with the qualitative/quantitative distinction.

Various writers have advocated the application of multiple methods as a means of overcoming the inherent weaknesses of 'mono-method' approaches. The concept of 'triangulation' as proposed by Denzin (1970) is perhaps the most widely cited rationale for multi-method approaches, and dominated early discussion of multi-method research strategies. As formulated by Denzin, this implied combining research methods to address the same research problem thereby enhancing the validity of resulting inferences. In this view, different data sources are seen as

essentially commensurate, and thus amenable to integration, in terms of the truth claims they make. However, whilst advocates of triangulation propose the combination of different methods as a means of minimising measurement error (e.g. Brewer and Hunter, 1989), the assumption that combining approaches in itself safeguards validity has been widely and effectively attacked (Fielding and Fielding, 1986; Bryman, 1992) leading to a significant reformulation of this concept in recent years (e.g. Denzin, 2012). Insofar as qualitative and quantitative methods reflect rather different concerns, and contrasting strengths and weaknesses, it is unlikely that the resulting data can be combined in the unproblematic fashion originally proposed by advocates of triangulation.

Brannen (1992: 16; see also Brannen, 2005) thus rightly refers to the complementarity of different approaches in multi-method research, in which rather than addressing the same aims methods are combined 'in order to study different levels of enquiry and in order to explore different aspects of the same problem'. Fielding and Fielding (1986: 33) similarly argue that combining methods may not necessarily enhance the accuracy of measurement but that it can produce a fuller, more multidimensional (but not more objective) account of social phenomena. Advocates of complementarity thus stress the relative merits of different methods in addressing different aspects of research problems. Combining qualitative and quantitative methods can potentially give both depth and breadth to research findings by drawing upon the different strengths of these approaches. In this chapter we seek to illustrate the applications of this interpretation of multiple method research in research on public perceptions of minimally adequate living standards.

Mixed methods in poverty research

As documented by Shaffer (2013: 269), a more systematic approach to the integration of qualitative and quantitative approaches and evidence has been a key characteristic of contemporary 'Q-squared' approaches in poverty research in the Global South, for example, in relation to the definition and social meaning of poverty, and understandings of its causes, dynamics and effects (see also Kanbur, 2005). Nevertheless, within UK research on poverty the language of dichotomy continues to pervade discussion of the methodological assumptions of research practice. Qualitative and quantitative approaches are typically taken to denote not just different methods and techniques, but also conflicting ontological and epistemological assumptions. One objective of this chapter is therefore to consider the philosophical and epistemological implications of combining qualitative and quantitative strategies in

research on poverty, and on this basis to examine the extent to which these approaches can be usefully combined in advancing the understanding of poverty. We illustrate the potential of this approach by considering the potential contribution of qualitative methods in addressing one basic question in contemporary poverty research, namely, 'what are the necessities of life?'. In doing so we hope to identify some key points of convergence and divergence between qualitative and quantitative approaches, and the issues and challenges they raise in assessing the degree of public consensus which may exist on this basic question.

One claimed advantage of mixed methods designs lies in their ability to address the 'identification problem' in research on poverty associated with difficulties in specifying the relevant dimensions of poverty, their weighting and poverty thresholds. Given that poverty is a social relationship, our definitions should reflect the meanings ascribed to the term within contemporary societies. Drawing upon Giddens' (1976) epistemology, Shaffer (2013: 270) thus observes that

> [s]ocial phenomena are 'intrinsically meaningful,' in the sense that their significance and/or existence depends on the meanings ascribed to them. Understanding a concept such as 'poverty,' entails a 'double hermeneutic' of interpreting a concept which is pre-interpreted by social actors.

One claimed strength of consensual approaches to poverty measurement has been its capacity to incorporate public perceptions on poverty in the scientific measurement of this concept using survey methods (e.g. Gordon, 2006). However, as we shall see, determining the public's views on the 'necessities of life' is far from straightforward, and qualitative methods have an important role to play in better understanding public views on this.

Quantifying the 'necessities of life' in Britain

What is the consensual approach to poverty measurement?

In recent decades, consensual approaches to poverty measurement have been widely adopted in large-scale survey research both in the UK and internationally. This approach was pioneered in the UK in the 'Breadline' series of poverty surveys as originally implemented in the 1983 Poor Britain survey (Mack & Lansley, 1985). It has subsequently been developed and refined in the 1990 Breadline Britain survey

(Gordon & Pantazis, 1997), the 1999 Poverty and Social Exclusion of Britain (1999 PSE-GB) (Gordon et al., 2001), the 2002 Poverty and Social Exclusion in Northern Ireland (2002 PSE-NI) surveys (Hillyard et al., 2003) and most recently in the 2012 PSE-UK survey that is currently in progress. In recent years, this approach has also been more widely adopted in order to better measure living standards and social and material deprivation in the European Union (Guio et al., 2012) and in many EU member states including Sweden (Hallerod, 1995, 1998), Finland (Kangas and Ritakallio, 1998), Ireland (Nolan and Whelan, 1996; Layte et al., 1999), Belgium (van den Bosch, 1998) and The Netherlands (Muffels, 1993). It is also an approach increasingly widely applied further afield in both high-income countries such as Australia (Saunders, 2011; Saunders and Wong, 2011), Japan (Abe, 2010), Russia (Tchernina, 1996) and New Zealand (Perry, 2009), and in middle- and low-income countries including Bangladesh (Ahmed, 2007), South Africa (Wright, 2011) and Vietnam (Davies and Smith, 1998).

Conceptually, the consensual approach has its roots in Townsend's relative deprivation theory of poverty (e.g. Townsend, 1979, 1987). Within this perspective, poverty is viewed as an insufficient command of resources over time resulting in an inability to fulfil needs (i.e. deprivation). Crucially, needs are understood here as socially determined and relative to prevailing normative standards. However, in response to long-standing critiques of the limitations of expert judgement in determining the 'necessities of life', since the 1983 Poor Britain study, social survey methods have been used to ascertain the public's views on what constitute contemporary necessities and to incorporate these public judgements in the subsequent survey measurement of deprivation.

Nevertheless, whilst the conceptual rationale for this approach is now well established, ascertaining public attitudes towards the necessities of life in the UK today is less straightforward than might at first appear. Although the contention that a widespread public consensus exists on the items and activities needed to avoid poverty in the UK today has been central to the consensual approach, the nature and meaning of 'consensus' here is not currently well understood. Moreover, existing qualitative studies do not in general provide unambiguous empirical support for the existence of a public consensus regarding the meaning and definition of poverty itself. Rather, they demonstrate the plurality of public conceptions of poverty, for example, with regard to preferences for 'absolute' versus 'relative' interpretations (e.g. Beresford et al., 1999; Dominy and Kempson, 2006; Crowley and Vulliamy, 2007; Flaherty, 2008; Women's Budget Group, 2008). These studies reinforce survey

findings demonstrating the diversity of public views on the definition of poverty (e.g. Park et al., 2007; Clery et al., 2013). We will argue here that qualitative methods can make an important contribution in advancing the understanding of these issues. We will base our observations on the measurement approach adopted in the 2012 PSE-UK study, though a very similar methodology was implemented in the 1990 and 1999 surveys. We begin by briefly outlining the approach taken to measure the 'necessities of life' within the 2012 PSE-UK study and the role of the qualitative methods discussed in this chapter in relation to this wider study. Although consensual approaches have been increasingly widely adopted in poverty research, this approach has not been without its critics. Especial concern has focused both on the extent to which survey methods can in principle be informative about the nature of public deliberations on this topic (Walker, 1987), and the extent to which they in fact demonstrate the degree of consensus claimed by their proponents (McKay, 2004). In this chapter we therefore go on to consider what light qualitative methods can shed on these key controversies surrounding consensual approaches to measuring the necessities of life.

Quantifying the 'necessities of life' in the 2012 PSE-UK study

In the interests of methodological consistency, and in order to facilitate meaningful comparisons over time in public perceptions of the necessities of life, the same overall measurement approach and question wording were used in the 1999 and 2012 studies. In the 2012 PSE-UK study, a module on public perceptions of necessities was included within the Summer 2012 Office for National Statistics Opinions Survey in Britain, and within the June 2012 Northern Ireland Statistics and Research Agency Omnibus Survey. Based upon stratified random sampling methods, a total of 1,447 interviews were conducted in Britain and 1,015 in Northern Ireland, representing achieved response rates of 51% and 53%, respectively.

The selection of items for inclusion in the necessities survey was based upon: (a) analysis of existing survey evidence derived primarily from the 1999 PSE-GB and 2002 PSE-NI studies, as well as other relevant survey sources; (b) expert review of potential survey items conducted by the PSE-UK project team and project International Advisory Group comprising academic, policy and practitioner experts on poverty measurement and analysis, and; (c) a series of 14 focus group discussions with different population groups in England, Scotland, Wales and Northern Ireland. Our main focus here is on the role of these qualitative focus group discussions in informing understanding of the nature and extent of public

consensus on the 'necessities of life' in the UK today. Within the context of typologies of mixed methods research designs, for example, as proposed by Teddlie and Tashakkori (2006), the approach adopted here thus describes a sequential approach in which a primarily quantitative survey design is supplemented by qualitative data and methods that seek to provide complementary evidence to inform the selection and specification of survey instruments.

Survey respondents were asked to undertake a shuffle card exercise in order to determine those items and activities 'which all adults should be able to afford and which they should not have to do without'. Respondents were asked to distinguish between those items and activities considered 'necessary' and those considered 'desirable but not necessary'. An example of the overall procedure is provided in Figure 2.1 in relation to adult items (with separate survey tasks relating to adult activities, child items and child activities).

SHUFFLE SET A (PINK) CARDS AND SORT BOX

[N1] *On these cards are a number of different items which relate to our standard of living. I would like you to indicate the living standards you feel all adults should have in Britain today by placing the cards in the appropriate box. BOX A is for items which you think are necessary – which all adults should be able to afford and which they should not have to do without. BOX B is for items which may be desirable but are not necessary.*

	SET E (PINK) CARDS	A	B	Unallocated
		Necessary	Desirable but not necessary	Does not apply
		[SETGNEC]		[SETGDK]
(1)	Enough money to keep your home in a decent state of decoration			
(2)	Replace any worn out furniture			
(3)	Replace or repair broken electrical goods such as refrigerator or washing machine			

Figure 2.1 Example of 2012 ONS Opinions Survey Necessities module question format (adult items)

Table 2.1 Public perceptions of the necessities of life in Britain, 2012 (percentage agreement)

Heating to keep home adequately warm	**96**	**Regular payments into an occupation/private pension**	**51**
Damp-free home	**94**	**Television**	**51**
Two meals a day	**91**	Presents for friends or family once a year	46
Visiting friends or family in hospital or other institution	**90**	Replace worn-out clothes with new ones	46
Replace or repair broken electrical goods	**86**	Friends or family round for meal/drink monthly	46
Fresh fruit and vegetables every day	**83**	Car	44
Washing machine	**82**	A holiday away from home for one week a year	42
All recommended dental work/ treatment	**82**	A small amount of money to spend each week on self	42
Celebrations on special occasions such as Christmas	**80**	Internet connection at home	41
A warm waterproof coat	**79**	Mobile phone	40
Attending weddings, funerals and other such occasions	**79**	Home computer	40
Telephone at home (landline or mobile)	**77**	Replace any worn-out furniture	39
Meat, fish or vegetarian equivalent every other day	**76**	An outfit to wear for social or family occasions	38
Curtains or window blinds	**71**	A roast joint (or its equivalent) once a week	36
A hobby or leisure activity	**70**	Hair done or cut regularly	35
Household contents insurance	**70**	Going out socially once a fortnight	34
Money to keep home in decent state of decoration	**69**	Attending places of worship	30
Appropriate clothes to wear for job interviews	**69**	Visits to friends or family in other parts of the country	27
A table, with chairs, at which all the family can eat	**64**	A meal out once a month	25
Taking part in sport/exercise activities or classes	**56**	Holidays abroad once a year	18
To be able to pay an unexpected expense of £500	**55**	Going out for a drink once a fortnight	17
Two pairs of all-weather shoes	**54**	Going to the cinema, theatre or music event monthly	15
Regular savings (£20 a month) for rainy days	**52**		